Microsoft® Business Solutions

Relationship Management– Navision® 3.70

Published by Microsoft Business Solutions ApS, Denmark.

Published in Denmark 2003.

DocID: NA-370-ILT-029-v01.00-W1W1

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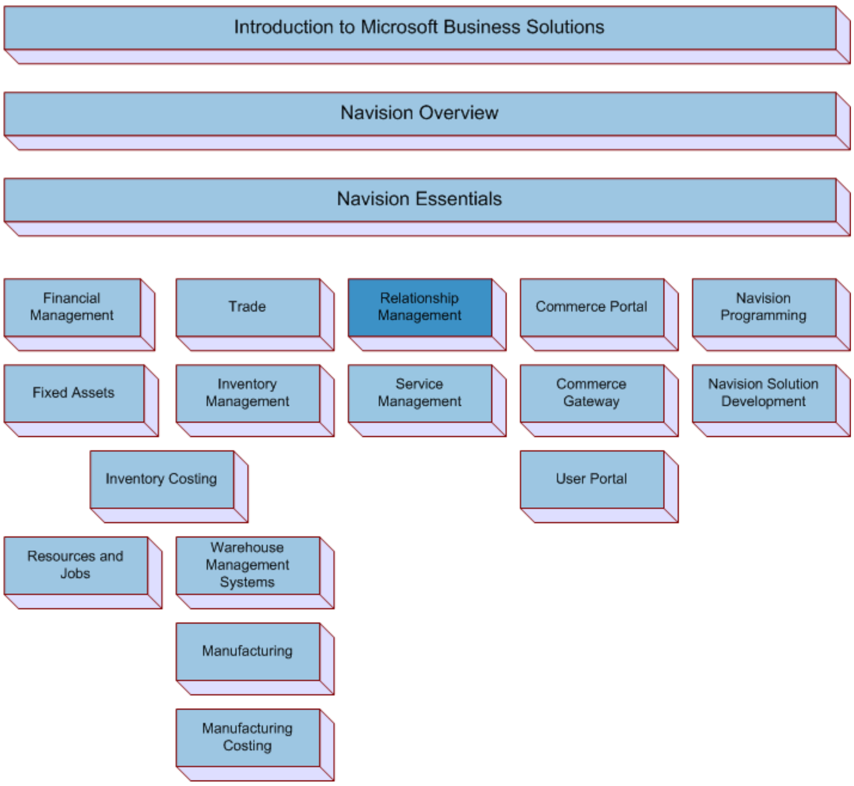
PREFACE

Navision is a collaborative business management solution for medium-sized companies. It is an integrated product that includes functionality to support financial and relationship management, distribution and manufacturing.

This course is designed for students who have a basic knowledge of Navision (equivalent to the contents of the Navision Essentials course) and is intended for people working at Microsoft Certified Business Solutions Partners who want to demonstrate, provide support for and set up Relationship Management.



Chapter 1

Introduction

This chapter outlines the overall structure of the Relationship Management course

This chapter contains the following sections:

- About the Relationship Management Sales Course
- Course Overview

1.1 ABOUT THE RELATIONSHIP MANAGEMENT SALES COURSE

This Relationship Management–Navision course is an instructor-led training course. It provides you with in-depth knowledge of the granules that make up the Relationship Management application area.

This course book provides the material you need to cover courses in Microsoft Business Solutions–Navision 3.70.

Course Organization

The course consists of the following chapters:

- Relationship Management
- Relationship Management Setup
- Contacts
- Interactions and Document Management
- Campaigns and Segmentation
- Task Management
- Outlook Integration
- Opportunity Management
- Profiling and Classification
- Multilanguage Salutation and Attachment
- Quotation to Contacts
- Document Logging

The chapters contain instructional text, which introduces an area of the program; examples of how this area works, and exercises that allow you to practice.

In addition to the course chapters, a number of appendixes offer you additional guidance and information:

Target Audience

The course is intended for people working in Microsoft Certified Business Solutions Partners who want to demonstrate and set up Relationship Management, and for those who want to be able to provide support for Relationship Management.

Course Prerequisites

Participants need to have a basic knowledge of Navision (equivalent to the contents of the Microsoft Business Solutions–Navision Essentials course), user-level knowledge of Microsoft Word, Microsoft Outlook, and Microsoft Internet Explorer.

Course Objectives

The course is designed to build the product knowledge required for you to demonstrate and set up Relationship Management, as well as providing you with the knowledge needed to be able to support Relationship Management.

1.2 COURSE OVERVIEW

Before you begin the course, you must have Microsoft Business Solutions–Navision installed.

Chapter 2, Relationship Management, introduces you to the concept of relationship management and gives you a general overview of the subject. In this chapter, you will also learn about some steps that need to be taken when implementing relationship management and the benefits of an integrated solution: ERP (Enterprise Resource Planning) and relationship management. In addition, you will learn about the vision for Relationship Management and the overall structure of the Relationship Management application area.

Chapter 3, Relationship Management Setup, provides you with the steps to set up Relationship Management. You will learn about:

- the Relationship Management Setup window
- automatically recorded interactions
- synchronization with customers, vendors and bank accounts
- duplicate search
- e-mail logging.

Chapter 4, Contacts, teaches you how the program can help you manage your contacts. In the chapter you will learn how to:

- set up contacts
- create contact companies
- create contact persons
- search for contacts
- search for duplicates
- synchronize contacts with customers, vendors and bank accounts
- export contacts
- view contact statistics

- view contact reports.

Chapter 5, Interactions and Document Management, teaches you how the program can help you log your interactions (which are all the types of communication between your company and your contacts) and how you can keep track of your documents. You will learn how to:

- set up interactions
- create interaction templates
- assign attachments to interaction templates
- create Microsoft Word documents
- copy, import and export attachments
- create automatically recorded interactions
- integrate your e-mails with MS Outlook
- use the interaction log
- view interaction statistics.

Chapter 6, Campaigns and Segmentation, teaches you how the program can help you create campaigns for various purposes and set up segments of your contacts. You will learn how to:

- set up and create campaigns
- create segments
- create interactions for segments
- create segments by reusing logged segments
- create segments by reusing saved segment criteria
- create campaign prices and discounts
- view campaign statistics.

Chapter 7, Task Management, teaches you how you can use the tools in the program to manage your tasks. You will learn how to:

- set up teams and activities
- create and modify to-dos
- assign activities
- create recurring to-dos
- close, cancel and delete to-dos
- view statistical information about to-dos

Chapter 8, Outlook Integration, teaches you how to set up and use MS Outlook integrated task, calendar and meeting scheduling. You will learn how you can:

- integrate meetings and appointments in Outlook with to-dos in Navision
- integrate tasks in Outlook with to-dos in Navision
- transfer contacts from Outlook to Navision and back
- synchronize data in Outlook and Navision.

Chapter 9, Opportunity Management, teaches you how to use opportunities to keep track of potential sales. You will learn how to:

- set up and create opportunities
- update opportunities
- create to-dos for opportunities
- create sales quotes and orders for opportunities
- close and delete opportunities
- view statistics.

Chapter 10, Profiling and Classification, teaches you how the program can help you create profiles of your contacts. You will learn how to:

- set up profile questionnaires
- enter contact profiles

- create segments using profile information
- update profile questionnaires
- test and print questionnaires.

Chapter 11, The Multilanguage Salutation and Attachment feature provides you with steps to set up Salutations and Attachments. You will learn about:

- creating salutation formulas
- assigning a salutation code to the contact
- creating an interaction using salutation code
- creating an interaction using a segment including logging of the segment.

Chapter 12, The Quotation to Contacts feature, provides you with steps to set up a customer template, and use it in quotation to contacts. You will learn about:

- setting up customer templates
- making a sales quote from the **Opportunity List** window
- making a sales quote from the **Sales Quote** window
- creating a sales order from the **Sales Quote** window.

Chapter 13, Document Logging, provides you with steps to apply this feature. You will learn about:

- saving a sales quote
- restoring a sales quote or sales order
- logging and saving a version of a sales order
- restoring a sales order.

Course Duration

We recommend that the course is taught over a period of three days. You can find a suggested schedule in Appendix A.

Dates

The dates shown in the screen shots are in the European format Therefore, if you use a different date format, for example, the American format, there will be differences between the solutions in the training material and your solutions.

The working date is set to be 25-01-01 (25 January 2001). It is important that this date is used when doing the activities.

Demonstration Data

All exercises are based on a fictitious company, CRONUS International Ltd.

License Information

To run the examples and exercises in this course you need a training license.

Further Information

You can learn more about Navision in the Microsoft Business Solutions–Navision Essentials and Financial Management Courses.

Chapter 2

Introduction to Relationship Management

This chapter introduces you to the concept of relationship management and the product.

This chapter contains the following sections:

- Defining Relationship Management
- Relationship Management Application
- Selling Points for Relationship Management

2.1 DEFINING RELATIONSHIP MANAGEMENT

To Navision, relationship management is more than just a set of products – it is a method designed to manage all your contacts and the interactions you have with them and a business strategy to identify, attract and retain customers; this helps businesses to optimize profitability and increase customer satisfaction. Just because you implement a RM software solution for a customer does not mean that this customer has a RM strategy. Defining a strategy should actually be the first stage in implementing customer relationship management. The process should start with companies implementing a RM strategy before they go on to implement a system to support this.

The goal for your customer is to establish long relationships with their customers. RM systems will just help them create and maintain these relationships. Clearly, this means that your customers have to start by deciding to become a customer-focused company and then determine a strategy to achieve this. If the RM strategy isn't right, there is the strong possibility that the implementation of a RM product will fail. A successful RM implementation integrates business processes with IT systems.

The Benefits of an Integrated Solution

CRM complements Enterprise Resource Planning (ERP) and is dependent on integration with an ERP system to provide a complete picture of a customer relationship.

For example:

- Marketing people need to know what customers have purchased in the past before attempting to interest customers in new products or cross-selling opportunities. This information may come from an order history file in the ERP system.

- Salespeople need to know if products are available before accepting new orders, ensuring that the products can be delivered to suit the customer's need. This information may come from an item card in an inventory management module.

- Production managers need to have a complete overview of vendors and when specific vendors will deliver material used in the production.

- The Finance Dept. in the company needs fully updated and accessible information from the company's bankers.

- Service people need to know if a customer has been billed for or has paid for their support contract before responding to support incidents. This information may come from billing or cash receipt information held in an accounts receivable module.

- Business partners need to be able to see customer-related ERP data, just as e-customers ordering online need to know that the goods they are ordering are in stock and quoted at the latest price. This information may come from an inventory control module.

In all these examples, different groups of people in a company need to access information stored in different places. When using an integrated solution, the whole company shares and has access to different data information silos and this enables everybody in the company to always have an entire overview of the customers.

2.2 RELATIONSHIP MANAGEMENT APPLICATION

In this section, we will look at the product Relationship Management. We will introduce you to the ideas and vision behind Relationship Management and to the structure of the product.

Vision for Relationship Management

Communication is a key word in the vision for Relationship Management. Our ambition is that companies using Relationship Management will be able to tailor communication with different customers (both existing and potential), vendors, business partners and others according to their needs. We believe that this is necessary for companies if they want to succeed in the future.

This means that Relationship Management is a tool that helps companies communicate with their customers based on their previous interactions. This tool also makes it easier for enterprises to keep track of all the documents that a company sends to customer.

This allows enterprises using Relationship Management to communicate with their customers on a more individual basis and thereby enables them to perform one-to-one marketing.

The structure of Relationship Management

In this part, we will present the features and granules that are included in Relationship Management.

The datasheet for Relationship Management is represented in the table below. The Key Features column presents both the key features of Relationship Management and also the six granules that Relationship Management consists of. Contact Management is the basic granule and Relationship Management cannot be sold without this granule.

Key Features	Description
Contact Management	Maintain an overview of your contacts Duplicate check automatically alerts you if you enter contact information that already exists Categorize your contacts based on profiling criteria created by you Personalize your approach to your contacts
Task Management	Organize your campaign, marketing and sales tasks Create to-do lists for yourself Assign tasks to other users or teams of users recorded in the program Create an activity composed of several to-dos Create internal to-dos without a contact
Contact Classification	Classify your contacts into different categories, and tailor your marketing messages to suit the individual needs of the customer Automatically group your contacts into different classes based on criteria specified by you, for example, group contacts in terms of revenue Rate your contacts based on weights of two questions to identify the value of a third question

Campaign Management	Organize campaigns based on the segments you create Segment your contacts based on specific criteria, such as sales, contact profiles and interactions Reuse existing segments, for example, specify whether or not these segments are to be updated every time new information on the contact is entered, or 'freeze' the group for follow-up activities, such as direct mailing Make use of multilanguage templates to target contacts in different languages Mail merge the identified segment with a Microsoft Word document
Document Management & Interaction Log	Log the interactions that you have with your contacts, such as a telephone call, a meeting or a letter. If an interaction contains a document, you can save it under the relevant contact and keep track of the document in question Record interactions performed in other application areas, including documents send to your contacts Call a contact simply by clicking the button on the contact card and using TAPI (Telephony Application Programming Interface) compliant telecom devices
Opportunity Management	Keep track of sales opportunities Section your sales process into different stages Maintain an overview of opportunities in your sales pipeline
Contact Search	Search for all information related to a contact, such as an opportunity, an address or a comment Misspell the contact name and you still retrieve information as fuzzy logic functionality is available

E-Mail Logging for Microsoft Exchange	Log all your e-mail correspondence – inbound or outbound Log your e-mails sent through Navision or sent through Microsoft Outlook Server-based solution to keep your e-mails in their natural environment
Outlook Client Integration	Synchronize your to-dos and contacts in Navision Attain with meetings, tasks and contacts in Microsoft Outlook Create, update, cancel and delete records in one program and the other program is automatically updated Gain access to contact information when you are working offline Update your information through a batch job when you are online again

System Requirements

Microsoft Exchange Server (min. version 5.5 with service pack 4) for E-Mail Logging for Microsoft Exchange.

Navision supports graphical 32-bit technology and genuine client server, multitasking environment. The following operating systems are supported:

Client 32-bit: Windows XP, Windows 2000, Windows NT, and Windows 98

Server: Navision Database Server: Windows 2000, Windows NT, IBM AIX

Microsoft SQL Server Option for Navision: Any operating system supported by MS SQL Server 2000.

2.3 SELLING POINTS FOR RELATIONSHIP MANAGEMENT

This section contains the selling points for Relationship Management. This is not a very in-depth discussion of the selling points but only meant to give you an overview. You can find a more in-depth discussion of the selling points in the Selling Against Sheet for Relationship Management – you can obtain this sheet from your local Microsoft Business Solutions office.

Integration to the ERP Solution

- A company only has to know one software platform.
- The product application area is completely integrated within Navision Solutions. It is a front-office application that is supported by back-office information.

Easily Adapts to Your Way of Working

- It is possible to customize the application to meet specific needs. This gives competitive advantages.

Easy to Use

- The new wizards, which are an integral part of Relationship Management, help users to easily work with the product.
- It is easy and quick to learn how to use the product.

All the Information You Need in One Place

- Customer information can easily be accessed while talking to a customer on the phone. Communication is individually tailored to each customer, and customer loyalty will increase as a result.

Chapter 3

Relationship Management Setup

In this chapter, you will learn about:

- The Relationship Management Setup Window
- Automatically Recorded Interactions
- Synchronization with Customers, Vendors and Bank Accounts
- Duplicate Search
- E-mail Journaling

3.1 THE RELATIONSHIP MANAGEMENT SETUP WINDOW

In the **Relationship Management Setup** window, you can decide how you want the program to manage certain aspects of your contacts, for example, default values and number series.

To open the **Relationship Management Setup** window, click Relationship Management, Setup, Relationship Mgt. Setup.

The **Relationship Management Setup** window contains eight tabs:

- General
- Inheritance
- Defaults
- Interactions
- Synchronization
- Numbering
- Duplicates
- E-mail Logging

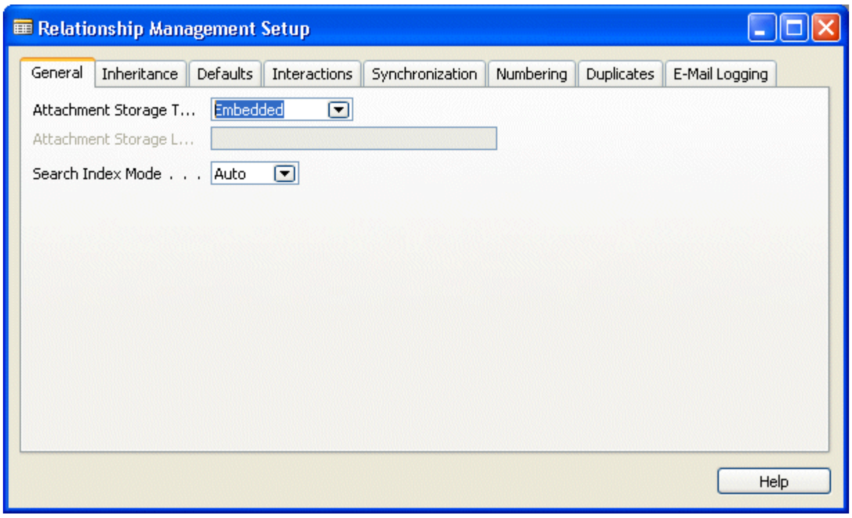
The General Tab

Attachment Storage

You can store within Navision all the documents that you send to your contacts, as well as the documents that you receive from your contacts, for example, letters, price lists, product information, and so on. You can assign these documents as attachments to interaction templates, which you can use to create interactions, for example sending a letter to a contact. (See chapter 5 “Interactions and Document Management.”)

You can attach all types of documents to interaction templates and interactions, for example, Microsoft Word documents, Microsoft Excel files, Microsoft PowerPoint presentations, .txt files, and so on. Before you can start working with attachments, you must specify the place where they will be stored. You do this in the **Relationship Management Setup** window, on the **General** tab.

In the **Attachment Storage Type** field, you can decide where you want the program to store the attachments: within Navision (option *Embedded*), or on a disk file. In order to facilitate the access to attachments, it is recommended that you store the attachments within Navision. However, if you decide to store them on a disk file, ensure that all users of the Relationship Management application area have access to it.



If you have selected *Disk File* as your attachment storage type, you can specify in the **Attachment Storage Location** field, the drive and path to the location where the attachments are stored.

Search Index Mode

The contact search index can be set manually or automatically. In the **Search Index Mode** field, select the option you need - **Auto** or **Manual**.

If you select **Auto**, each time you add or modify any information, for example, if you change the description of an interaction or a contact address, the program will automatically process this information for future search operations.

If you select **Manual**, you will need to run the Generate Search Index batch job for the program to process the new or changed information for future search operations.

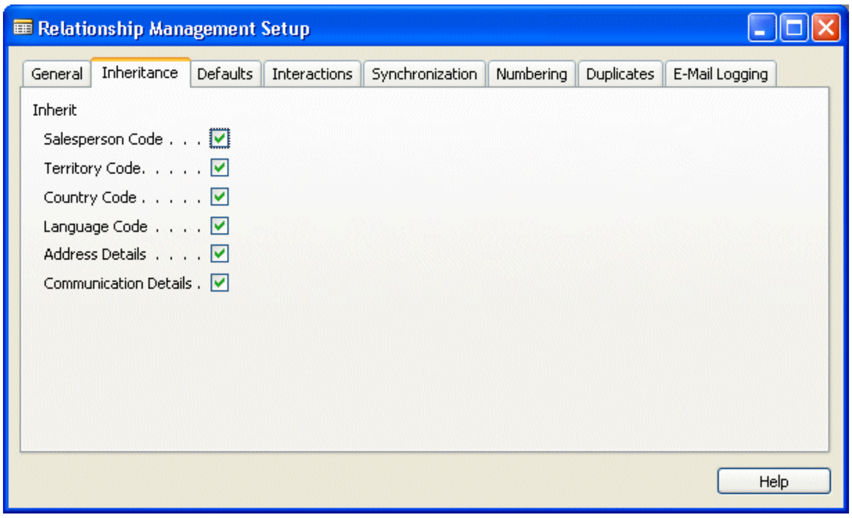
Inheritance

Some information about contact companies is identical to information about contact persons working within these companies, for example, the address details (for example, the **Address**, **Address 2** and **Post Code** fields). The program can automatically copy these fields from the contact company card to the contact person card each time you create a contact person for a recorded contact company. This prevents you from entering the same information both on the contact company card and on the contact person card.

You can have the program copy the following information:

- The salesperson code
- The territory code
- The country code
- The language code
- Address details, that is the address, address 2, city, post code and county
- Communication details, that is the fax number, telex answer back and phone number

You can specify this in the **Relationship Management Setup** window, on the **Inheritance** tab.

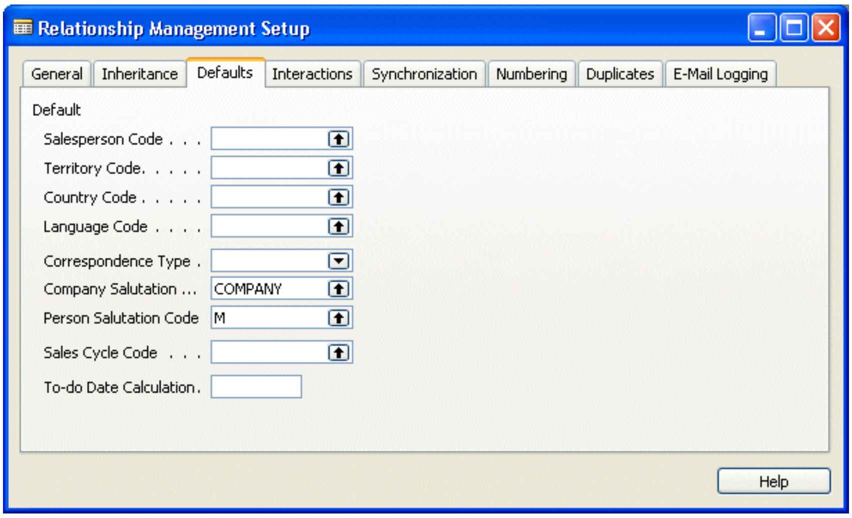


For example, if you want the program to automatically copy the salesperson code from the contact company card to the contact cards of the persons working within this company, you must insert a check mark in the Inherit Salesperson Code field.

When you modify one or more of these fields on the contact company card, the program will automatically modify the field(s) on the contact person card (unless you have manually modified the field on the contact person card).

Defaults

You can have the program automatically assign a specific language code, territory code, salesperson code, country code and sales cycle code as defaults to each new contact you create. To do this, you must enter the codes you want to use as default values in the **Relationship Management Setup** window, on the **Defaults** tab.



For example, if you want the program to automatically assign the country code GB to each new contact you create, enter *GB* in the **Default Country Code** field.

Note

The inheritance of fields overrides the default values you have set up. For example, if you have set up English as a default language, but the contact company's language has been modified to German, the program will automatically assign German as the language code for the contact persons you create for that company.

Default Salutation Codes

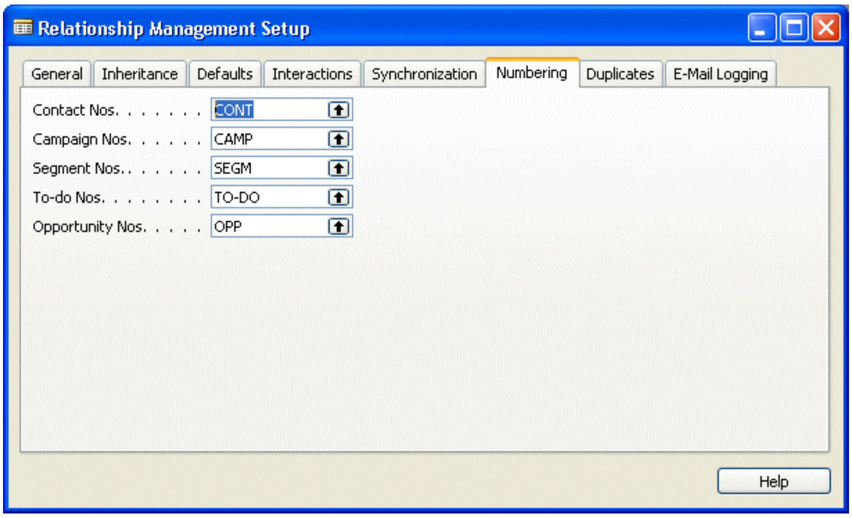
You can set up a default salutation code to be used automatically by the program for your company contacts and your person contacts. To enter a default company or person salutation code, in the **Relationship Management Setup** window, on the **Defaults** tab, click the AssistButton in the **Company Salutation Code** field or **Person Salutation Code** field. Select a code from the **Salutations** window that appears, or enter a new code and click OK (see chapter 11, "Multilanguage Salutation and Attachment").

Default Sales Cycle Code

You can record in the program all the sales opportunities you have with your contacts (see chapter 8, "Opportunity Management"). You can set up a default sales cycle code that the program will automatically assign to each new opportunity you create. You do this on the **Defaults** tab by entering a sales cycle code in the **Default Sales Cycle Code** field.

Number Series

You can set up number series for contacts, campaigns, to-dos, segments and opportunities in the **Relationship Management Setup** window on the **Numbering** tab.



For example, if you have set up a number series for contacts, then when you press Enter in the **No.** field on the contact card, the program automatically enters the next available contact number.

3.2 AUTOMATICALLY RECORDED INTERACTIONS

The Relationship Management application area enables you to record all the interactions you have with your contacts, for example, meetings, phone calls, e-mails, correspondence, sales orders, invoices, and so on. The program stores recorded interactions in the **Interaction Log Entry** table. The **Interaction Log Entry** table contains the interactions you have created manually using the **Create Interaction** wizard (or from the **Segment** window) and also the interactions that the program records automatically.

Sales, Purchase and Service Documents

The program can automatically record sales and purchase documents that you create and print for your customers and vendors.

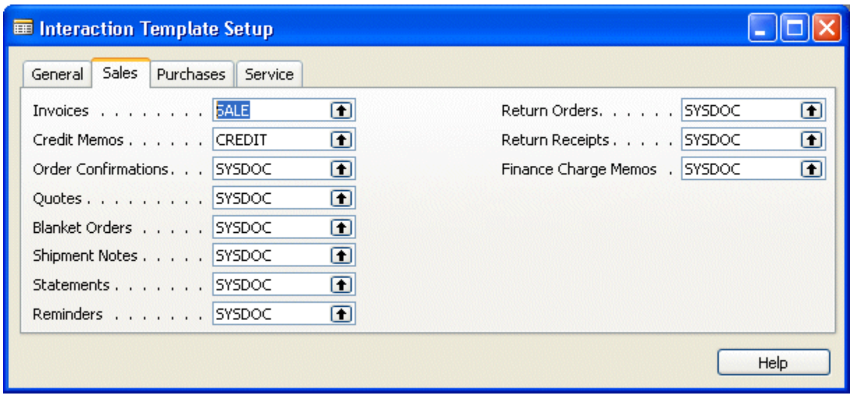
You can have the program automatically record an interaction when you do the following things in the program:

- Print sales and purchase quotes
- Print sales and purchase orders
- Print sales and purchase invoices
- Print sales and purchase blanket orders
- Print sales reminders and statements
- Print sales and purchase credit memos
- Print sales shipment notes
- Print purchase receipts
- Create sales service orders
- Post sales service orders
- Print sales return orders and return receipts
- Print sales finance charge memos
- Print purchase return shipments and return order confirmations

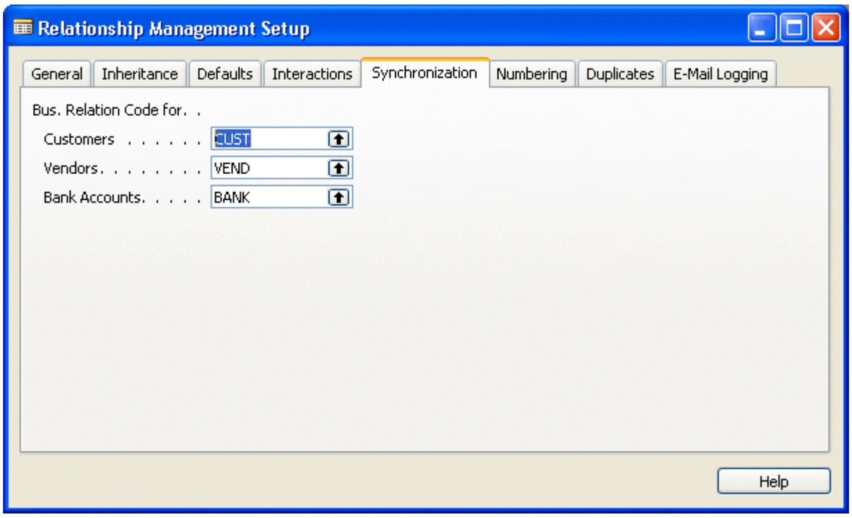
- Print service contracts, contract quotes and quotes

For the program to automatically record these types of interactions, you must do the following:

1 Specify interaction template codes for sales, purchase and service documents. You do this by clicking Relationship Management, Setup, Interaction, Interaction Template Setup and specifying interaction templates for the documents in the **Interaction Template Setup** window, on the **Sales**, **Purchases** and **Service** tabs.



2 Set up the synchronization with customers and vendors. You do this in the **Relationship Management Setup** window, on the **Synchronization** tab.



3 Make sure that the customer or bank account is also recorded as a contact in the Relationship Management application area.

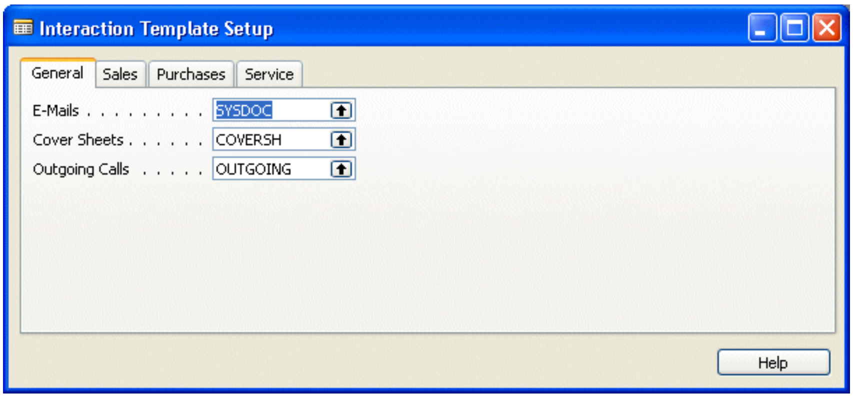
For example, if you want the program to automatically record the sales quotes you print for your customers as interactions, you must enter an interaction template code in the **Sales Quotes** field on the **Interactions** tab.

E-Mails, Phone Calls and Cover Sheets

You can have the program automatically record an interaction when you:

- Print cover sheets for your contacts from the contact card and the **Segment** window.
- Send e-mails to your contacts from the contact card, the customer card, the vendor card and the bank account card by clicking the icon to the right of the **E-Mail** field and using the **Create E-Mail** wizard.
- Call your contacts from the contact card, the customer card, the vendor card and the bank account card by clicking the icon to the right of the **Phone No.** field and using the **Make Phone Call** wizard. (You must have a TAPI compliant telephone and the right installation.)

For the program to do this you must specify interaction template codes for e-mails, cover sheets and outgoing phone calls in the **Interaction Template Setup** window, on the **General** tab.

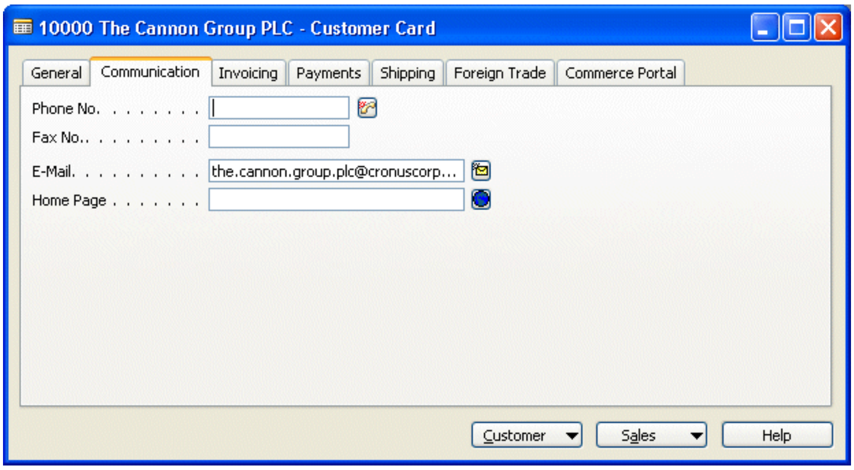


For example, if you want the program to automatically record the e-mails you send to your contacts as interactions, you must enter an interaction template code in the **E-Mails** field on the **General** tab.

Recording Interactions from the Customer Card, the Vendor Card and the Bank Account Card

On the customer card, the vendor card and the bank account card, on the

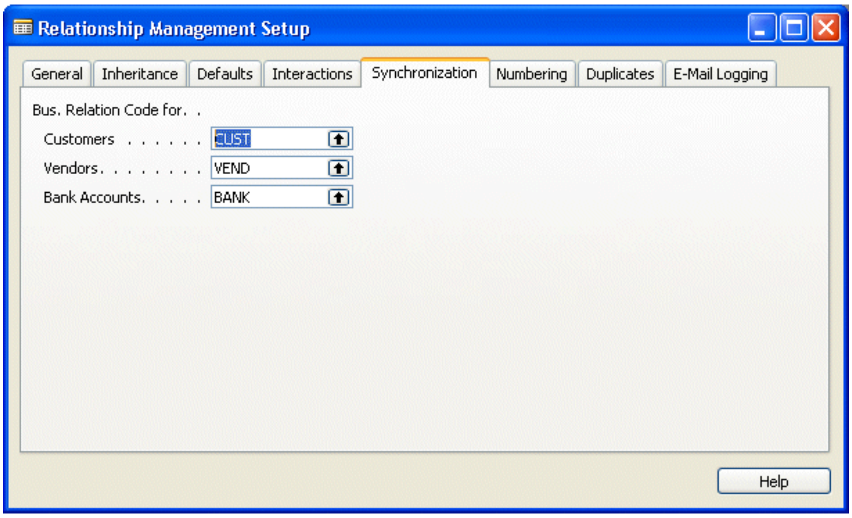
Communication tab, there is an icon with a telephone to the right of the **Phone No.** field. You can only use this button to record telephone calls as interactions if the customer, vendor or bank account is also recorded as a contact in the Relationship Management application area.



3.3 SYNCHRONIZATION WITH CUSTOMERS, VENDORS AND BANK ACCOUNTS

If some contacts are also customers, vendors, and/or bank accounts, you can synchronize their contact cards with their customer cards, vendor cards, and/or bank account cards.

Before you can synchronize contacts with customers, vendors and/or bank accounts, you must specify a business relation code for customers, vendors and bank accounts in the **Relationship Management Setup** window on the **Synchronization** tab.



For example, in order for the program to synchronize contact cards with customer cards, you must enter a business relation code in the **Bus. Relation Code for Customers** field.

Note

If you want the program to record the sales document that you print for your customers as an interaction, you must specify a business relation code in the Bus. Relation Code for Customers field.

If you want the program to record the purchase document that you print for your vendors as an interaction, you must specify a business relation code in the Bus. Relation Code for Vendors field.

Synchronizing the Contact Card with the Customer Card, Vendor Card and/or Bank Account Card

After you have specified business relation codes for customers, vendors and bank accounts, you can synchronize contacts with customers, vendors and bank accounts by:

- Creating contacts as customers, vendors and/or bank accounts from the contact card.
- Creating contacts from customers, vendors and/or bank accounts.
- Linking contacts with existing customers, vendors and/or bank accounts.

Some details such as invoicing and posting information do not appear on the contact card. You have to add them manually on the customer card, vendor card and/or bank account card when you create contacts as customers, vendors and/or bank accounts.

Consequences of Synchronization

When the contact card is synchronized with the customer card, the vendor card and/or bank account card:

- You only have to update information in one place. For example, if you modify the phone number on the contact card, the program will automatically make the same modification on the customer card, vendor card, and/or bank account card.
- If you have specified a number series for contacts, then when you create a customer card, a vendor card or a bank account card, the program automatically creates a contact card for the customer, vendor or bank account.
- You can open the contact's customer card or vendor card, and from there create sales quotes, blanket orders and orders, or purchase quotes, blanket orders and orders.
- You can have the program record interactions when you perform actions in Navision, such as printing orders, blanket orders, creating sales service orders, sending e-mails, and so on.
- If you delete a contact linked to a customer, vendor and/or bank account, only the contact card is removed from the program. The customer card, vendor card and/or bank account card remain(s) in the

program.

- If you delete a customer, vendor and/or bank account linked to the contact, the contact card remains in the program.

3.4 DUPLICATE SEARCH

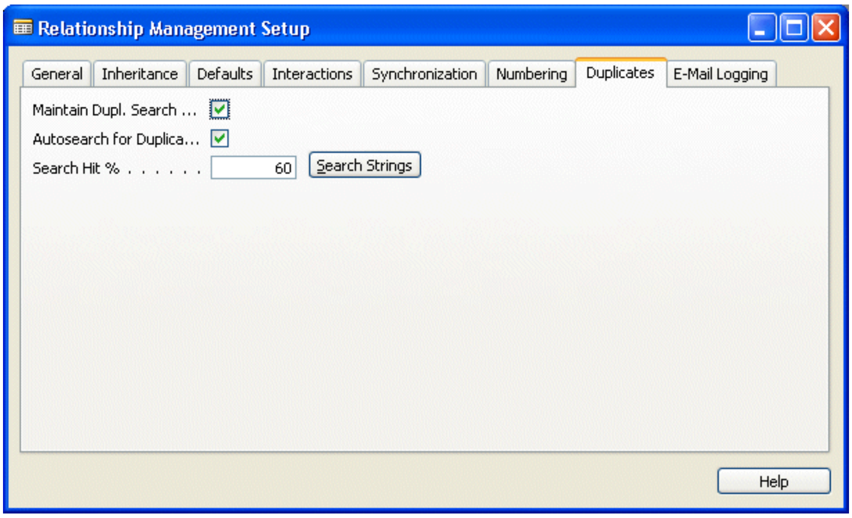
The Relationship Management application area enables you to search for duplicate contacts. The contact duplicate search only applies to contact companies (and not to contact persons).

You can search for duplicates in two ways:

- You can have the program automatically generate search strings and search for a possible duplicate each time you enter a contact.
- Or you can search for contacts manually, for example, after you have entered new contacts.

Setting Up the Automatic Search for Duplicates

In the **Relationship Management Setup** window, on the **Duplicates** tab, you can specify the way you want to search for duplicates.



Insert a check mark in the **Maintain Dupl. Search String** field if you want the program to automatically maintain the search strings you have defined in the **Search String Setup** window (see below).

Insert a check mark in the **Autosearch for Duplicates** field if you want the program to automatically search for duplicates each time you create a new contact.

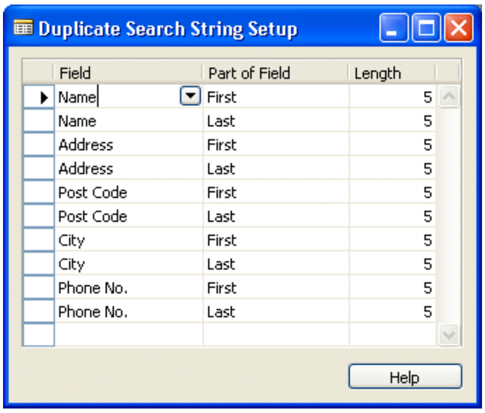
Setting Up Duplicate Search Strings

When searching for duplicates, the program uses search strings. You can set up search strings in the **Duplicate Search String Setup** window by combining the first and last characters of any of the following fields in the **Contact** table: **Name**, **Name 2**, **Address**, **Address 2**, **Post Code**, **City**, **Phone No.** and **VAT Registration No.**

Each time you generate the duplicate search (or each time you create a new company), the program will compare the new contact's search strings with the search strings of the other contacts in the program.

Example

In the **Duplicate Search String Setup** window, you can set up the following search strings:



Field	Part of Field	Length
Name	First	5
Name	Last	5
Address	First	5
Address	Last	5
Post Code	First	5
Post Code	Last	5
City	First	5
City	Last	5
Phone No.	First	5
Phone No.	Last	5

Then, for a contact with the following information:

London Postmaster

10 North Lake Avenue

London GB-N12 5XY

VAT Registration No.: 895741963

Tel: 5544 5566

The program will create the following search strings:

LONDO, ASTER, 10NOR, VENUE, LONDO, ONDON, GBN12, 125XY, 89574, 41963, 55445, 45566

The Search Hit Percentage

In the **Relationship Management Setup** window, on the **Duplicates** tab, you can define a search hit percentage. The search hit percentage is the level of precision you want the program to apply when searching for duplicates.

In the **Search Hit %** field, you can enter a percentage, which indicates how many search strings must be identical between two contacts for the program to consider them duplicates:

- A low percentage results in the program finding many duplicates, but many of these will not be true duplicates. For example, if the percent is equal to 5, the program will consider as duplicates all contacts with 5% of identical search strings.
- A high percentage gives a better chance of finding true duplicates. For example, if the percent is equal to 90, the program will consider as duplicates all contacts with 90% of identical search strings.

Example

Look back at the previous example.

If the search hit percent is equal to 50%, then when five of another contact's search strings (out of ten search strings in total) are identical to the search strings generated for London Postmaster., the program will consider the two contacts duplicates.

3.5 E-MAIL LOGGING

With the Relationship Management application area, you can exchange e-mails with your contacts, customers, vendors and so on. You can send and receive your e-mails either from Navision or from Microsoft Outlook.

Setting Up the E-Mail Parameters

Before you can exchange e-mails this way and have the system store and queue your e-mails, you must set up the parameters on the **E-mail Logging** tab in the **Relationship Management Setup** window:

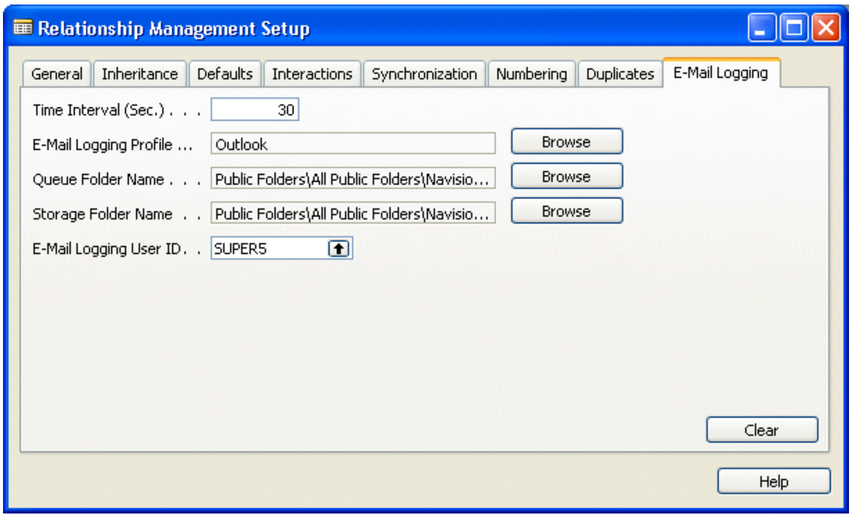
1. In the **Time Interval (Sec.)** field, enter the interval in seconds that you want the e-mail dispatcher to use for checking for mails in the Navision Queue folder. The default is 30 seconds but you can change that.

2. In the **E-Mail Logging Profile Name** field, use the **Browse** button to find a profile name to insert in the field. If you only have one Outlook profile (which is normally the case), this profile will automatically be selected when you click the **Browse** button.

3. In the **Queue Folder Name** field, use the **Browse** button to set the folder in Outlook that you want to use as your queue folder for your e-mails.

4. In the **Storage Folder Name** field, use the **Browse** button to set the folder in Outlook that you want to use as your storage folder for your e-mails.

5. Use the **E-Mail Logging User ID** field to enter the Navision user you want to use for the logging or click the AssistButton and fill in the fields in the **Database Logins** window that appears. When this Navision user logs in, the e-mail dispatcher starts logging with the interval you specified in the **Time Interval (Sec.)** field.
   If you use a Navision Application Server, this field should not be filled out.



Note

For more detailed information about installation and setup of the e-mail logging functionality, please refer to the following technical white paper: Relationship Management–Navision Technical White Paper.

Chapter 4

Contacts

This chapter contains the following sections:

- Setting Up Contacts
- The Contact Card
- Creating Contact Companies
- Creating Contact Persons
- Searching for Contacts
- Searching for Duplicates
- Synchronizing Contacts with Customers, Vendors and Bank Accounts
- Exporting Contacts
- Contact Statistics
- Contact Reports
- Exercise
- Self-Test

4.1 SETTING UP CONTACTS

In the Relationship Management application area, you can record as contacts all the external entities that you have business relations with, for example, customers, prospective customers, vendors, lawyers, consultants, and so on.

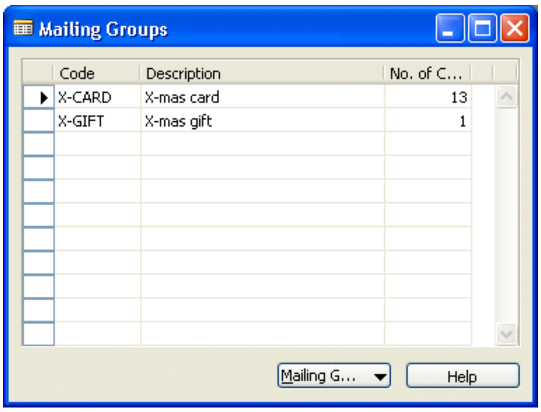
When creating contacts in the program, you can enter specific information, such as the industry the contact companies belong to, your business relations with the contacts, and so on. Before you can do this, you must set up the different codes you will use to assign this information to your contact companies and people: mailing groups, industry groups, business relations, Web sources, organizational levels and job responsibilities.

Setting Up Mailing Groups

Mailing groups are used to identify groups of contacts that you want to send the same information to, such as a price list or a Christmas card. You set up mailing groups in the **Mailing Groups** window.

To set up mailing groups, follow this procedure:

1 Click Relationship Management, Setup, Mailing Groups. The **Mailing Groups** window appears.



2 Press F3 to enter a new mailing group.

3 In the **Code** field, enter a code for the new mailing group.

4 In the **Description** field, enter a description of the new mailing group.

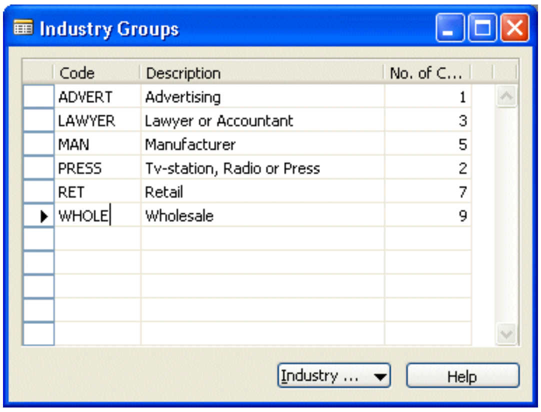
The **No. of Contacts** field contains the number of contacts that have been assigned the mailing group. To see a list of the contacts you have assigned the mailing group, click the AssistButton to the right of the **No. of Contacts** field, or click Mailing Group, Contacts. The **Mailing Group Contacts** window appears.

In this window, you can assign new contacts to the mailing group.

Setting Up Industry Groups

You can use industry groups to specify which industry your contact companies belong to, for example, the retail industry. You set up industry groups in the **Industry Groups** window.

To open the **Industry Groups** window, click Relationship Management, Setup, Company, Industry Groups:



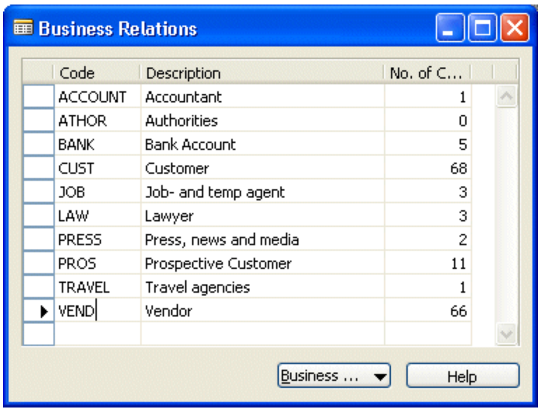
To set up industry groups, follow the same procedure as for setting up mailing groups.

The **No. of Contacts** field contains the number of contact companies that have been assigned the industry group. To see a list of the contact companies that you have assigned the industry group, click the AssistButton to the right of the **No. of Contacts** field, or click Industry Group, Contacts. The **Industry Group Contacts** window appears. In this window, you can assign contact companies to the industry group.

Setting Up Business Relations

Business relations are used to indicate the business relationship you have with your contact companies. You can specify whether a contact is a customer, a bank, a vendor, and so on. You set up business relations in the **Business Relations** window.

To open the **Business Relations** window, click Relationship Management, Setup, Company, Business Relations:



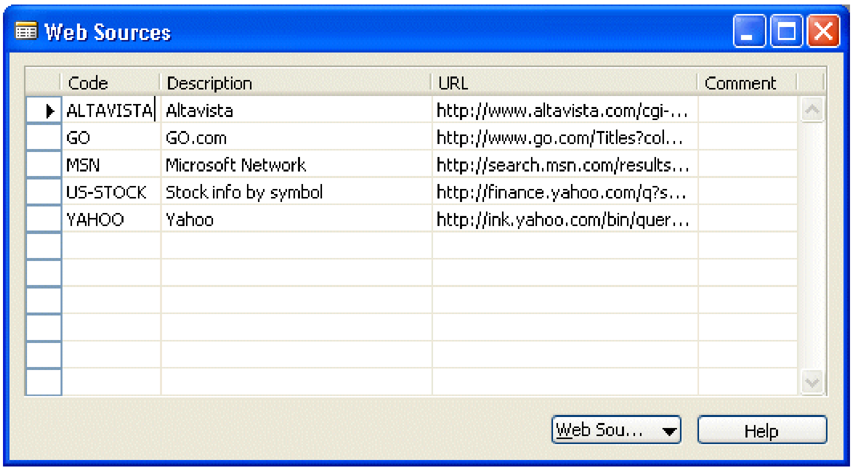
To set up business relations, follow the same procedure as for setting up mailing groups.

The **No. of Contacts** field contains the number of contact companies that have been assigned the business relation. To see a list of the contact companies that you have assigned the business relation, click the AssistButton to the right of the **No. of Contacts** field, or click Business Relation, Contacts. The **Business Relation Contacts** window appears. In this window, you can assign business relations to other contact companies.

Setting Up Web Sources

In the **Web Sources** window, you can set up the Web sources (search engines and Web sites) you want the program to use when looking for information about your contact companies on the Internet.

To open the **Web Sources** window, click Relationship Management, Setup, Company, Web Sources.

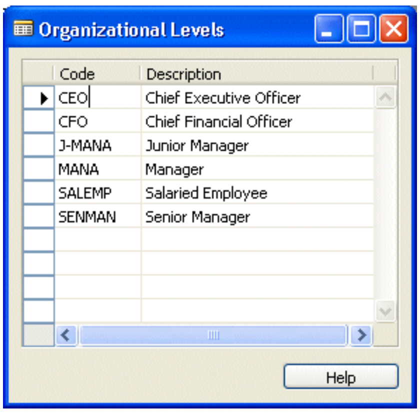


In the **URL** field, enter the URL the program will use to search for information about the contact company on the Internet. Type *%1* to indicate the place of the search word in the URL. When you launch the Web source from a contact card, the program will replace %1 with the search word (for example, the name of the company) that you have entered in the **Contact Web Sources** window.

Setting Up Organizational Levels

In the **Organizational Levels** window, you can set up the organizational levels you want to use when entering information about your contact people, for example, *Manager*.

To open the **Organizational Levels** window, click Relationship Management, Setup, Person, Organizational Levels:



Setting Up Job Responsibilities

In the **Job Responsibilities** window, you can set up the job responsibilities you want to use when entering information about your contact persons, for example, *Sales Responsible*.

To open the **Job Responsibilities** window, click Relationship Management, Setup, Person, Job Responsibilities.

The **No. of Contacts** field contains the number of contact people that have been assigned the job responsibility. To see a list of the contact people that you have assigned the job responsibility, click the AssistButton to the right of the **No. of Contacts** field, or click Job Responsibility, Contacts. The **Job Responsibility Contacts** window appears.

In this window, you can assign new contact persons to the job responsibility.

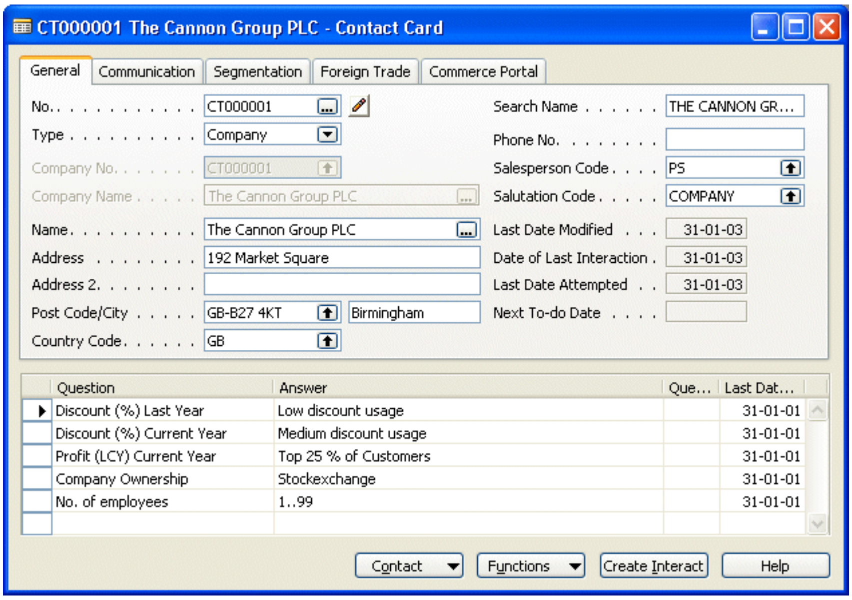
4.2 THE CONTACT CARD

The contact card contains information about your contacts. To open the contact card, click Relationship Management, Contacts.

You can use the contact card to view information about your contacts, and you can also create a new card for each contact company or person that you want to record in the program.

The contact card contains both basic information (for example, the name, address and phone number of the contact) and more detailed information that helps you improve and personalize your business relationship with your contacts, such as information about a company's size and ownership, and information about people's interests and family life.

Here is the contact card for The Cannon Group:



By combining general and detailed information about the contact, the contact card gives you an instant view of who the contact is. The contact card is composed of two parts:

- The header, which contains general, communication, segmentation, and foreign trade information about the contact.
- The lines, which contain an overview of the contact's profile. You can enter the contact's profile in the **Contact Profile Answers** window (see chapter 9, "Profiling and Classification").

The General Tab

On the **General** tab, you can view general information about your contact.

The Type of Contact

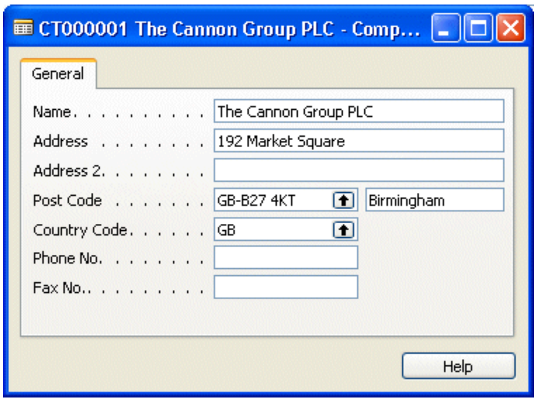
The contact card can contain both contact people and contact companies. In the **Type** field, you can see whether the contact is a company or a person:

- If the contact is a person, the **Company No.** field contains the number of the contact company the person works for, and the **Company Name** field contains the name of the contact company the person works for.
- If the contact is a company, the **Company No.** and **Company Name** fields are not active.

Company Details

If the contact is a person, you can view details about the company that the contact person works for in the **Company Details** window.

To open the **Company Details** window, click the AssistButton to the right of the **Company Name** field.



In this window, you can see a short presentation of the company. It contains the basic information that identifies the contact company the person works for, such as name and address details. This window enables you to see which company a contact person works for without having to open the contact card.

Name Details

If the contact is a person, you can see the details of the contact's name in the **Name Details** window.

To open the **Name Details** window, click the AssistButton to the right of the **Name** field.

In this window, you can enter the different parts of a contact's name, as well as the contact's job title and assigned salutation.

The Interactions Involving the Contact

The **Date of Last Interaction** field on the contact card contains the date of the last successful interaction involving the contact, for example, a received or sent mail or e-mail.

The **Last Date Attempted** field contains the date when the contact was last contacted, for example when you tried to call the contact with or without success.

The information contained in the **Date of Last Interaction** and **Last Date Attempted** fields depends on the type of contact:

- If the contact is a company, the **Date of Last Interaction** and **Last Date Attempted** fields contain information based on the interactions involving the company, as well as those involving the people working for that company.

- If the contact is a person, the **Date of Last Interaction** and **Last Date Attempted** fields contain information based on the interactions involving the particular person.

To see more details about the interaction, click the AssistButton to the right of the field.

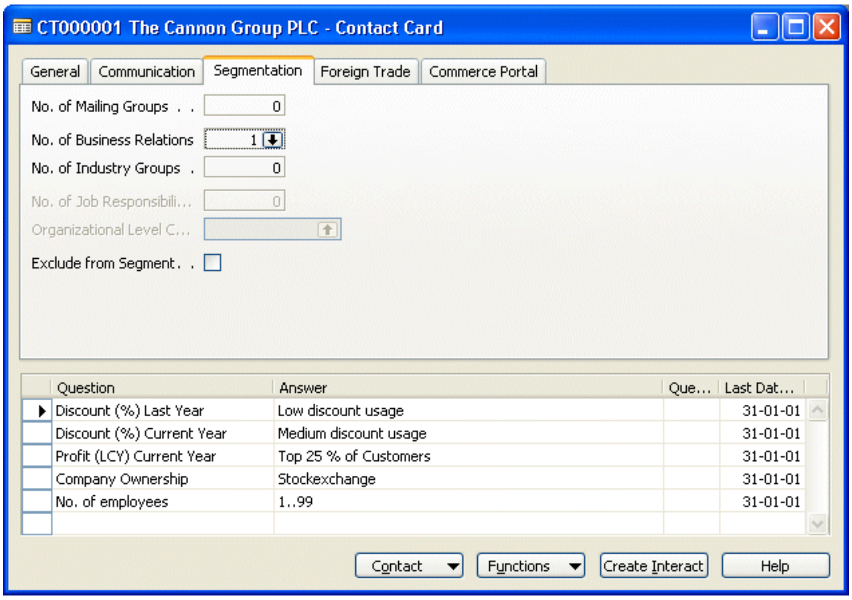
The To-dos Involving the Contact

The **Next To-do Date** field contains the date of the next to-do involving the contact.

To see more information about the to-do, click the AssistButton to the right of the field.

The Segmentation Tab

The **Segmentation** tab contains information about the mailing groups, industry groups, business relations, job responsibilities and organizational levels assigned to the contact. Click the **Segmentation** tab.



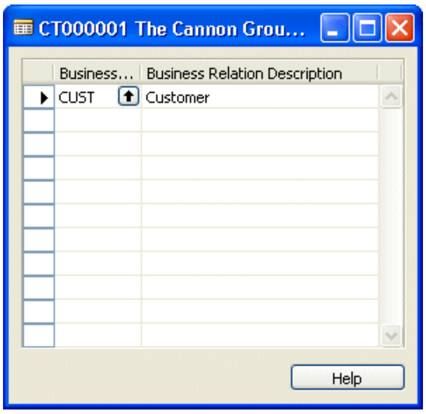
The **No. of Mailing Groups** field contains the number of mailing groups assigned to the contact.

The **No. of Business Relations** field contains the number of business relations assigned to the contact.

The **No. of Industry Groups** field contains the number of industry groups assigned to the contact.

If the contact is a person, the **No. of Mailing Groups**, **No. of Business Relations** and **No. of Industry Groups** fields contain information about the mailing groups, business relations, and industry groups assigned to the contact company the person works for. Click the AssistButton to the right of these fields to see which mailing groups, business relations and industry groups that the contact is assigned to.

For example, if you click the AssistButton to the right of the **No. of Business Relations** field, the **Contact Business Relations** window appears, containing a list of the business relations you have assigned to the contact company.



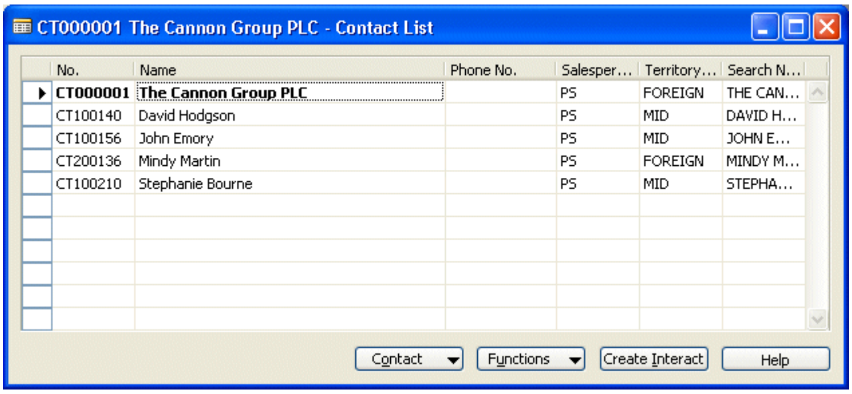
The **No. of Job Responsibility** and **Organizational Level Code** fields are only valid for contact people.

A check mark in the **Exclude from Segment** field indicates that the program should not include the contact in segments.

Viewing Related Contacts

You can view a list of the contacts working within a company in the **Contact List** window. This window contains both the contact company and the people working within the company.

To view a list of the contact people working for The Cannon Group, on the contact card for The Cannon Group, click Contact, Related Contacts.



This window gives you a quick overview of your contact people within a company, and enables you to quickly and easily navigate from a contact person card to the contact card of the company the person works for, or to the contact card of other people working for the same contact company.

4.3 CREATING CONTACT COMPANIES

You create a contact company by setting up a contact card for the company.

To create a contact company in the Relationship Management application area, follow this procedure:

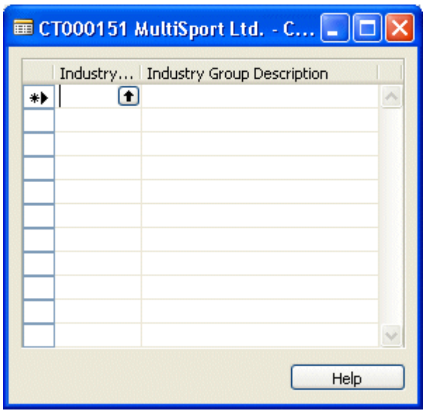
1. Click Relationship Management, Contacts. The contact card appears.
2. Press F3 to enter a new contact.
3. In the **No.** field, press ENTER to have the program automatically enter the next available contact number.
4. In the **Type** field, select *Company*.
5. In the **Name** field, enter the name of the contact company.
6. In the **Address**, **Post Code/City**, and **Phone No.** fields, fill in the relevant information.
7. In the **Salesperson Code** field, select the name of the responsible salesperson.

After you have created a contact card for your new contact company, you can enter more detailed information, such as the industry the company belongs to, your business relationship with the company, and so on.

Assigning Industry Groups to Contact Companies

To assign an industry group to a contact, follow this procedure:

1. On the contact card, click Contact, Company, Industry Groups. The **Contact Industry Groups** window appears.



2 Press F3 to assign a new industry group to the company.

3 Click the AssistButton to the right of the **Industry Group Code** field to see the available industry groups.

4 Select the relevant industry group and click OK.

The program automatically enters *1*, in the **No. of Industry Groups** field, on the **Segmentation** tab of the contact card.

Assigning Business Relations

To assign business relations to a contact, follow this procedure:

1 On the contact card, click Contact, Company, Business Relations. The **Contact Business Relations** window appears.

2 Press F3 to assign a new business relation to the company.

3 Click the AssistButton to the right of the **Business Relation Code** field to see the available business relations.

4 Select the relevant business relation code and click OK.

The program automatically enters *1*, in the **No. of Business Relations** field, on the **Segmentation** tab of the contact card.

Assigning Web Sources

You use Web sources to have quick access to all types of information about your contact on the Internet.

In the **Contact Web Sources** window, you can select a search engine or Web site and enter a search word that the program will use when searching for information about the contact on the Internet.

To assign a Web source to a contact, follow this procedure:

1 On the contact card, click Contact, Company, Web Sources. The **Contact Web Sources** window appears.

2 In the **Web Source Code** field, select the desired search engine or Web site.

3 In the **Search Word** field, enter the word you want the program to use to search for information about the company.

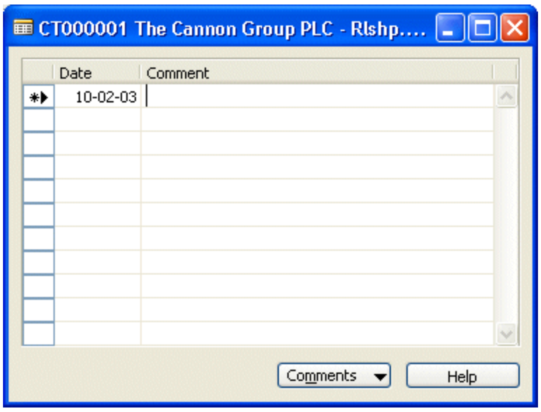
Launching Web Sources

To have the program open your Internet browser and display a list of matching links, click Function, Launch.

Entering Comments

You can enter comments about a contact in the **Rlshp. Mgt. Comment Sheet** window. Follow this procedure:

1 On the contact card, click Contact, Comments.



2 The work date automatically appears in the **Date** field. You can enter another date if you like.

3 In the **Comment** field, enter any comments you have about the contact.

Exercise 1 Setting Up a Contact Company

As a salesperson working for Cronus, you regularly meet prospective customers. At the end of each week, you enter the results of your visits in the Relationship Management application area.

Earlier today, you had a meeting with a new prospective customer, a company called MultiSport, which seemed to be interested in Cronus' new bicycle model.

1 Create MultiSport as a contact company in the Relationship Management application area. The company details are:

   MultiSport Ltd.
   2200 Newport Street
   GB-N12 5XY London
   Telephone 5050-4545

   Richard Lum (*RL*) is the responsible salesperson.

2 As a reseller of sport equipment, MultiSport Ltd. belongs to the retail industry. Assign the **Retail** industry group to MultiSport.

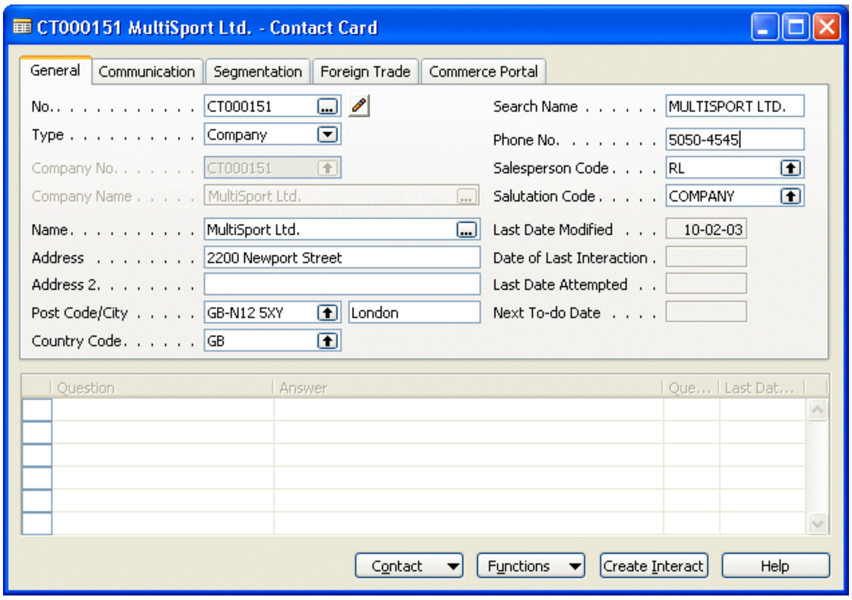
3 MultiSport is not yet a customer of Cronus, but a prospective customer. Enter the business relationship you have with MultiSport in the **Contact Business Relations** window.

4 Because you closely follow your contacts' business environment, you would like to have quick access, through Yahoo, to all types of information about MultiSport Ltd. on the Internet. Assign Yahoo as a Web source for MultiSport. Use *Multisport* as the search word.

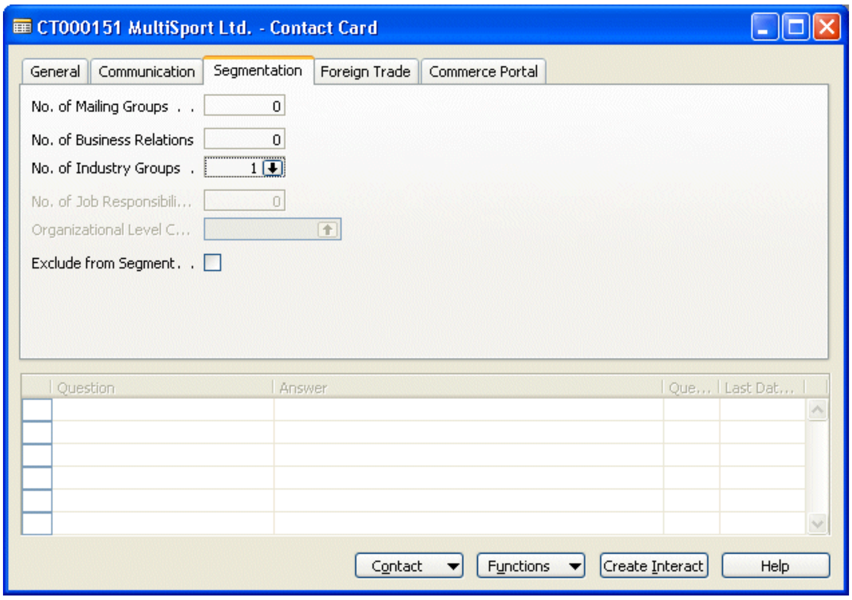
5 You would like to specify that any question concerning MultiSport be addressed to you. Enter this information in the **Rlshp. Mgt. Comment Sheet** window.

Solutions

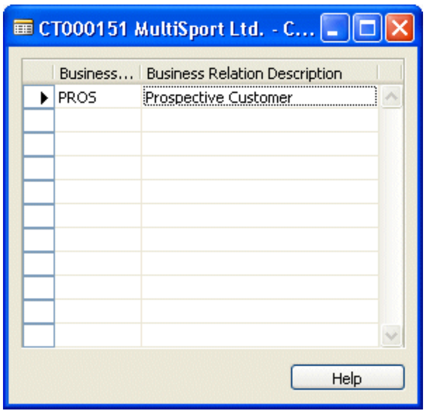
The contact card for MultiSport Ltd. should look like this:



When you have assigned an industry group to MultiSport, the **Segmentation** tab on the contact card should look like this:

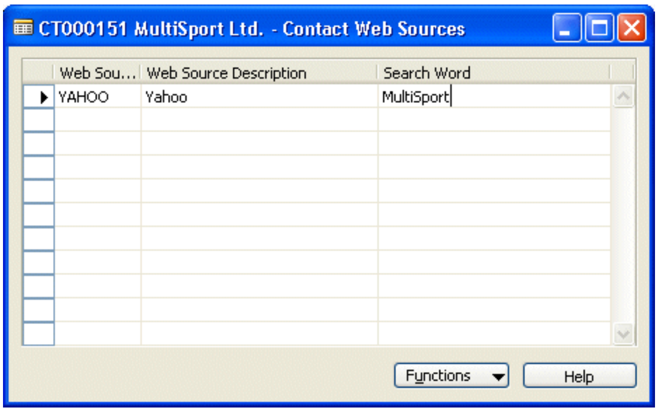


When you have assigned a business relation code to MultiSport, the **Contact Business Relations** window should look like this:



On the contact card, on the **Segmentation** tab, the **No. of Business Relations** field should contain*1*.

When you have assigned a Web source to MultiSport, the **Contact Web Sources** window should look like this:



4.4 CREATING CONTACT PERSONS

You create a contact person by setting up a contact card for the person. You can create contact persons for existing contact companies, or you can create independent contact persons.

Creating Contact Persons for Existing Contact Companies

To create a contact person for an existing contact company, follow this procedure:

1 Click Relationship Management, Contacts.

2 On the contact card, press **F3** to enter a new card.

3 In the **No.** field, press ENTER to have the program automatically enter the next available contact number.

4 In the **Type** field, enter *Person*.

5 In the **Company No.** field, enter the contact number of the relevant contact company. Click the AssistButton to the right of the field to see a list of the existing contacts.

The program automatically copies the address details, salesperson code and phone number from the company's contact card to the contact person’s contact card.

Entering Name Details

To enter the details of the contact person’s name, follow this procedure:

1 Open the **Name Details** window by clicking the AssistButton to the right of the **Name** field.

2 In the **Salutation Code** field, click the AssistButton to the right to open the **Salutations** window

3 In the **Salutations** window, click Salutation, Formulas to open the **Salutation Formulas** window, and select or create a salutation formula as described in Chapter 10 "Multilanguage Salutation and Attachment".

Creating Independent Contact Persons

The Relationship Management application area also enables you to record independent contact persons. Independent contact persons are people who don't work for a particular company, but who work independently or free-lance. You can enter the details of an independent contact person on a contact card.

To create an independent contact person, follow this procedure:

1. Click Relationship Management, Contacts.
2. On the contact card, press **F3** to enter a new card.
3. In the **No.** field, press ENTER to have the program automatically enter the next available contact number.
4. In the **Type** field, enter *Person*.
5. Leave the **Company No.** field empty.
6. In the **Name** field, enter the contact person's name.
7. Enter the contact person's address details in the appropriate fields.

Finding an Independent Contact in the Contact List Window

The program automatically inserts independent contact people at the top of the **Contact List** window.

To find the independent contact in the **Contact List** window, go to the contact card and click Contact, List. Then scroll to the top of the **Contact List** window.

The program displays the independent contacts in alphabetical order.

Exercise 2 Creating Contact Persons

A few weeks after your first meeting at MultiSport, you meet the purchaser, Mr. Smith. When you come back to the office, you would like to record Mr. Smith in the program as a contact person at MultiSport. Mr. Smith gave you his business card, which looks like this:

MultiSport Ltd. *Sportswear*   **John Smith** - Purchaser 2200 Newport Street, GB-N12 5XY London Phone 5050 4545 Direct 5050 4567

1 Create a contact card for Mr. Smith. Include the details listed on the business card.

2 Enter Mr. Smith's details in the **Name Details** window.

3 Enter John Smith's job responsibility in the program.

For the translation of all publications concerning their products and corporate information, Cronus works with a freelance translator, Madeline Parker. You would like to record her as a contact in the program.

1 Create a contact card for Madeline Parker as an independent contact person.

2 Enter Madeline Parker's address details:

456 Swimthon Street
GB-MO2 4RT Manchester

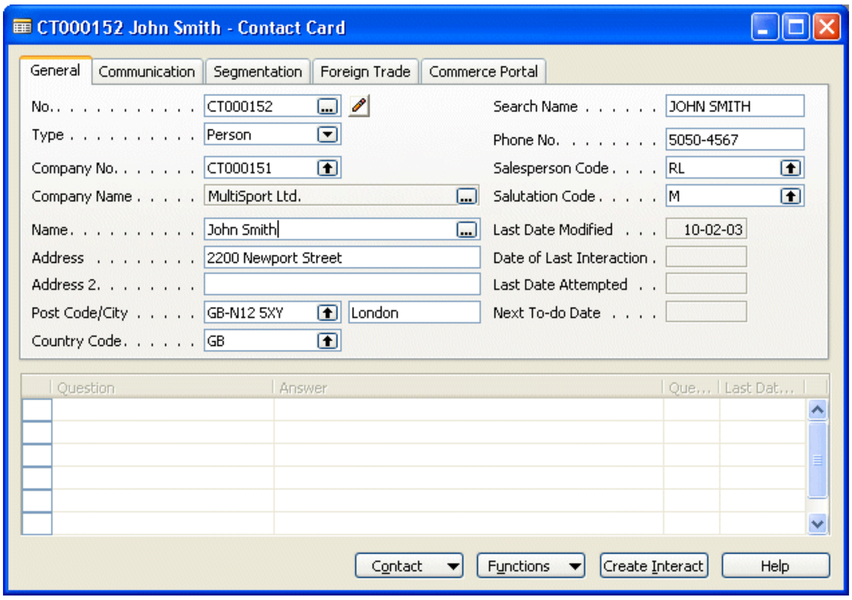
3 Find Madeline Parker's name in the **Contact List** window.

Solutions

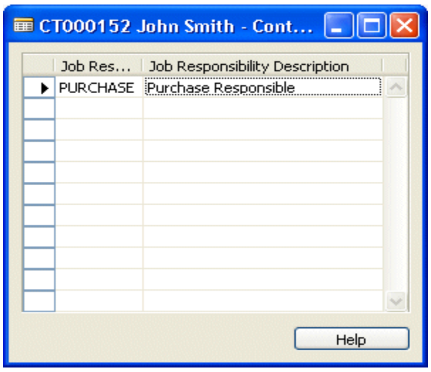
When you have entered John Smith's details, the **Name Details** window should look like this:

The program automatically enters the contact person's full name in the **Name** field on the contact card.

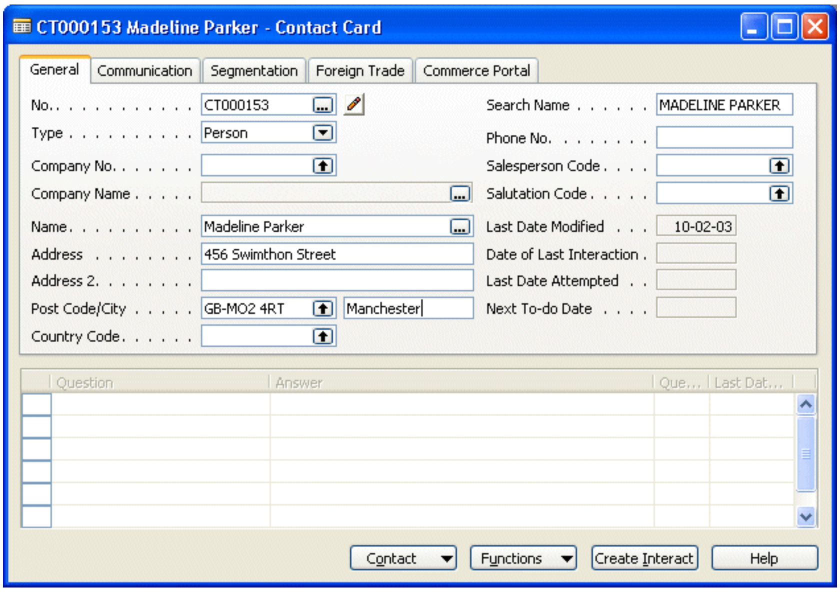
The contact card you have just created looks like this:



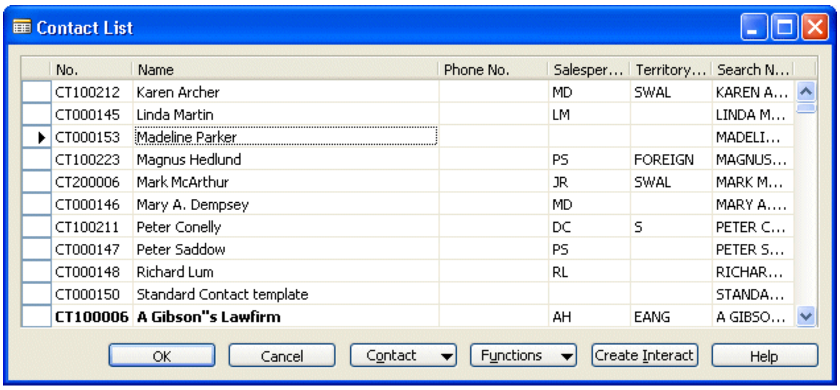
When you have entered John Smith's job responsibility, the **Contact Job Responsibility** window will look like this:



The contact card for Madeline Parker should look like this:



The **Contact List** window should look like this:



4.5 SEARCHING FOR CONTACTS

The Contact Search feature allows you to increase the accuracy of your search for contact information. The results of the search will be based on the nearest match or closest match for the word or group of words you have entered in the **Find What** field. You do not have to enter the exact word or phrase in order to find results with the Contact Search feature; just one of the words you are looking for will do.

For example, when an employee receives a phone call, he needs to quickly find the contact card and other information to serve the customer individually. The employee may not always have his customer’s complete name to search for or perhaps he can’t remember exactly how it is spelled. With Contact Search the employee can find his customer’s contact card using the approximate spelling of the customer’s name or just the customer’s company name or some other detail about the customer that he can remember quickly.

Fields Supported by Contact Search

While searching for contacts, the program considers the following fields:

In the **Contact** table:

- **Name**
- **Search Name**
- **Name 2**
- **Address**
- **Address 2**
- **City**
- **Phone No.**
- **Telex No.**
- **Fax No.**
- **Telex Answer Back**
- **VAT Registration No.**

- **Post Code**
- **County**
- **E-Mail**
- **Home Page**
- **Company Name**
- **Mobile Phone No.**
- **Pager**

In the **Rlshp. Mgt. Comment Line** table:

- **Comment**

In the **Interaction Log Entry** table:

- **Description**
- **Subject**

In the **To-do** table:

- **Description**

In the **Opportunity** table:

- **Description**

Blurry Keys

For all words the program has found in the fields listed above, it creates one or two blurry keys following a certain fuzzy logic algorithm, for example, JN and AN for Jean or KRX and KRK for Karch. After the program has completed the search for the exact match, it performs the search on the basis of the blurry keys which allows you to find words with a close spelling and/or pronunciation in the languages of the Romano-Germanic group, and therefore increases the search hit rate.

The program does not use the blurry keys while searching for contacts if you have selected the check box in the **Exact Match** field in the **Contact Search** window or if you use the wildcards in your search query.

To be able to use the Contact Search feature, you should set up some parameters that the program will use while searching for contacts.

Setting Up Search Parameters

Reindexing information

You need to index the information that will be used for future searches, especially if you have modified or added any information.

You may choose to have the contact search index generated automatically or do it manually:

1. Click **Relationship Management**, **Setup**. In the **Search Index Mode** field, select the option you need – **Auto** or **Manual.**

2. If you select **Auto**, each time you add or modify any information, for example, if you change the description of an interaction or a contact address, the program will automatically update the data in the fields processed by the contact search feature as well as the blurry keys for the words they contain for future search operations.

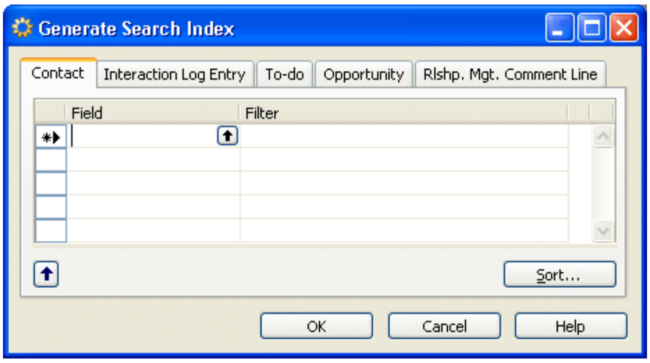
3. If you select **Manual**, you will need to run the **Generate Search Index** batch job for the program to process the new or changed information for future search operations.

To reindex the information about contacts:

1. Click **Relationship Management**, **Periodic Activities**.

2. On the dropdown menu, click **Generate Contact Search Index**. Choose the area you want to reindex.

3. The corresponding **Generate Search Index** window appears. If, for example, you have chosen to reindex all areas simultaneously, the **Generate Search Index** window will look as follows:



4 Enter the filters you want to apply (optional).

5 Click **OK** to start reindexing. The progress bar appears indicating the status of the process. It shows the information about the overall and current processes.

Note

Try to avoid clicking **Cancel** during the reindexing process. This may cause unpredictable results and the search function will work incorrectly.

Setting Up Delimiters

You may also want to define a set of characters that the system will use to split the textual information into smaller parts which will be used while performing the search.

The following characters are used by the system as default delimiters:

! "#$%&'()*+,-./:;<=>?@[\]^_`{|}~

Using delimiters in the program allows you to increase the search hit rate.

For example, in the **Rlshp. Mgt. Comment Line** window, you entered the comment:

Call the manager,important!

You were in a hurry and did not read this sentence again. You therefore forgot to put a space between the two words: "*manager*" and "*important.*"

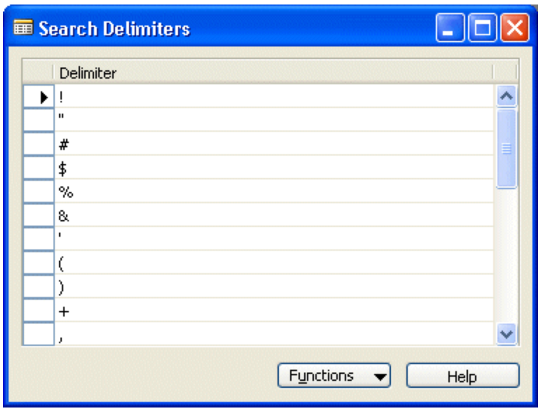
Later you are looking for the contact with this comment. Unless you have put a comma "," into the delimiters set, you will not be able to find this entry.

If a comma is not considered by the program as a separator between words, you will never find this comment line entering either "*manager*" or "*important*" in the **Find What** field. The system will look for the "*manager,important*" entry only.

To set up search delimiters, follow this procedure:

1 Click **Relationship Management**, **Setup**, **Contact Search**, **Delimiters**.

2 The **Search Delimiters** window appears. It contains the delimiters that the program uses while searching.



3 Enter or delete any delimiters you want. If you do so, the dialog box appears asking you to reindex the information according to the new settings. Click **Yes** to start reindexing.* The progress bar appears. Your new settings are saved into the database.

* If you click **No**, your changes will not be accepted.

Note

If you have changed the set of delimiters and then decided to return to the default one, click **Functions**, **Restore Delimiters Defaults**.

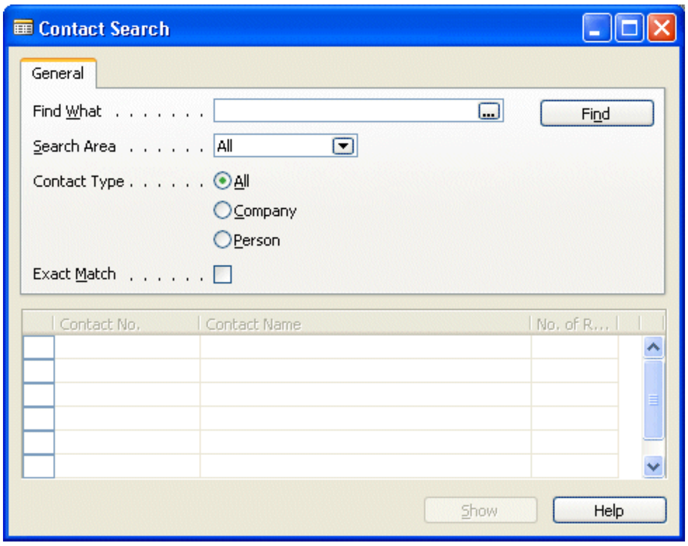
The four characters: space ( ), asterisk (*), "at" (@), and question mark (?) are used by the program as delimiters regardless of whether or not they are included into the current delimiters list.

You can open the Contact Search feature from the main menu in the **Relationship Management** application area, as well as from the **Contact Card** or the **Contact List** and the **Create Interaction**, **Create To-do** and **Create Opportunity** wizards.

Searching for Contacts from the Main Menu

To search for a contact from the main menu, follow this procedure:

1 Click **Relationship Management**, **Contact Search**. The **Contact Search** window appears.



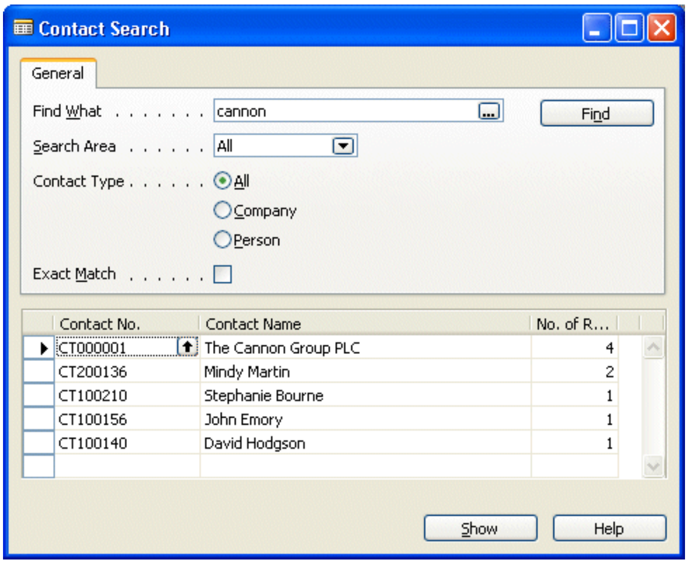
2 In the **Find What** field on the **General** tab, type a word or phrase that is related to the contact you want to find.

3 Select the area to search in from the **Search Area** dropdown menu. Select the type of contact you will search for by clicking one of the following options in the **Contact Type** field: **All**, **Company**, or **Person**.

4 If you want the program to find only exact matches, select the check box in the **Exact Match** field.

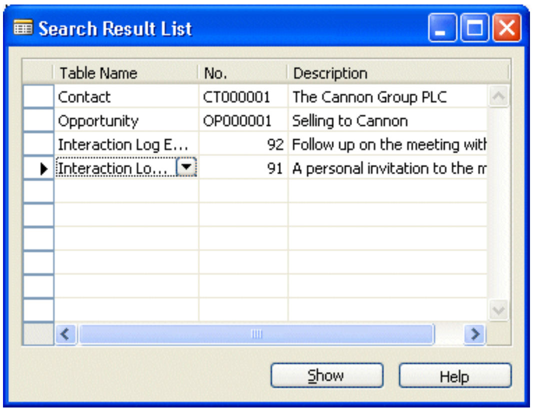
5 Click **Find**.

6 The search results (if any) will be displayed on the lines in the bottom part of the window.



7 Select the one you need and click **Show** to view the **Contact Card**.

8 If you want to see the place where the match was found, on the **Contact Search** window, place the cursor in the **No. of Records** field of the contact you need and click the drill-down button to the right. The **Search Result List** appears. You can view the corresponding card (or the list for the **Interaction Log Entry**) where the match was found by clicking **Show**.



Using the System to Compose Search Expressions

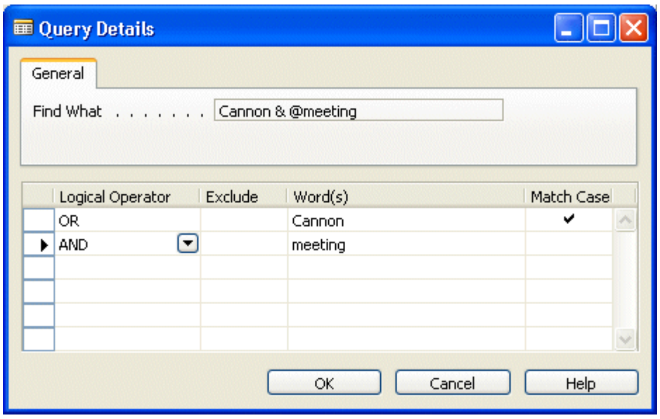
If you are not sure how to enter a search expression, you can have the system help you compose it. Do the following:

1 Click **Relationship Management**, **Contact Search**. The **Contact**

Search window appears.

2 In the **Find What** field, on the **General** tab, you can type a word or phrase that is related to the contact you want to find or you may leave the field blank.

3 Click the AssistEdit button at the end of the **Find What** field. The **Query Details** window appears.



4 In the **Logical Operator** field, select the option you need from the dropdown menu.

5 Place a check mark in the **Exclude** field if you want the system to search for the contacts that do not contain the search word(s) in the **Word(s)** field.

6 In the **Word(s)** field, add a new word or edit the existing one (if any) for the contact you want to find.

7 Place a check mark in the **Match Case** field if you want the system to take letter case into consideration. You may enter several lines of the extended search expression (repeat steps 4-7).

8 Click **OK**. The **Contact Search** window will appear. The system breaks down the search expression and places it in the **Find What** field using special symbols. You may specify other search parameters (see step 3 and further of the previous procedure), or just click **Find** to initiate the search. To view the results, follow the procedure (from step 7) described above.

Note

If you have entered an incorrect search expression, a warning message will appear. Press F1 to see the rules for entering search expressions.

Searching for Contacts from the Contact Card or the Contact List

You can also use the **Contact Search** feature from the **Contact Card** or the **Contact List**.

To search for contacts from the Contact Card or the Contact List:

1 Click **Functions**, **Contact Search**. The **Contact Search** window appears.

2 In the **Find What** field, on the **General** tab, type a word or phrase that is related to the contact you want to find.

3 Select the area to search in from the **Search Area** dropdown menu. Select the type of contact you will search for by clicking one of the following options in the **Contact Type** field: **All**, **Company**, or **Person**.

4 If you want the program to find only exact matches, place a check mark in the **Exact Match** field.

5 Click **Find**.

6 The search results (if any) will be displayed on the lines in the bottom part of the window.

7 Select the one you need and click **Show** to view the **Contact Card**.

8 If you want to see the place where the match was found, on the **Contact Search** window place the cursor in the **No. of Records** field of the contact you need and click the drill-down button to the right. The **Search Result List** appears. You can view the corresponding card (or the list for the **Interaction Log Entry**) where the match was found by clicking **Show**.

Note

When you search for a contact from the **Contact Card** or **Contact List**, you may use an additional functionality. When you select one of the search results in the **Contact Search** window and click **OK**, the program automatically opens the **Contact Card** for this contact (if you were searching from the **Contact Card**) and the **Contact List** with the contact in question activated (if you were searching from the **Contact List**).

Searching for Contacts while Working with Wizards

To search for a contact using the **Create To-do**, **Create Opportunity** and **Create Interaction** wizards, click the **Contact Search** icon next to the **Who is the contact?**, **Which contact is involved?**, and **Who are you interacting with?** fields correspondingly. The **Contact Search** window appears. Then follow the same procedure as for searching for a contact from the main menu (from step 2).

Entering Search Expressions

A search expression is one or several words that you want the system to use while searching for a contact. The search expression may be either as simple as one descriptive word or more complex: several words (possibly with wild cards) with logical operators.
The full list of implemented logical operators and wild card symbols is provided below.

| (logical 'or')
For example, *Cannon | Gun*
To search for contacts which have "Cannon" or "Gun" as part of their fields.

& (logical 'and')
For example, *Cannon & Group*
To search for contacts which have "Cannon" and "Group" as part of their fields.

<> (logical 'not')
For example, <>*Cannon*
To search for contacts which do not have "Cannon" as part of their fields.

' ' (exact phrase)
For example, *'The Cannon Group'*
To search for contacts which have the exact phrase "The Cannon Group" in their fields.

? (one unknown character)

For example, *Cann?n*
To search for contacts which have “Cannan” or “Cannon”, and so on, as part of their fields.

* (string of unknown characters)
For example, **no*, *no, no**
To search for contacts which have texts that contain “no” as part of their fields.

@ (ignore case)
For example, @*Cannon*
To search for contacts which have “cannon” or “CANNON”, and so on, as part of their fields.

Examples

The following extended examples will help you enter search expressions. They will illustrate most controversial and difficult cases in order to minimize the possibility of making a mistake and so increase the accuracy of your search results.

- The default **OR** operator:
  By default, Contact Search finds the contacts that include any of the key words which are entered in the **Find What** field. The contacts containing more matching results will be the first in the list of the search results.
  Thus, if you simply type *The Cannon Group PLC*, the system will consider this search expression in the following way: The | Cannon | Group | PLC and will show all contacts that have any of these words.

- The logical **And** operator:
  This operator is not a default one. It is used by the program to search for the contacts whose text includes all key words entered in the **Find What** field. Please note that these key words may or may not be located in the same field or in the same record related to the contact. But the position in the search results list will reflect the relevance of each contact: the ones containing matches within the same field or record will be the first in the list.
  Thus, if you have entered *bicycle & discount*, the system will look for these words within the text information of the contact (for instance, the word *bicycle* may be found in the opportunities, and *discount* in the interactions involving this contact).

- Case sensitivity by default:
  The key words entered in the **Find What** field are case-sensitive by

default. If you put @ at the beginning of the search expression, you will ask the system not to take letter case into consideration while searching.
For example:
manager – case-sensitive
@*manager* – case-insensitive

- Exact phrase:
  The search expression entered (or converted by the program) in single quotes presupposes that the system looks for the exact phrase which should be located in one field of a particular record; the match should reflect the order of the words precisely as they appear in the search expression.
  If you type *'London Light Company'*, the system will find exactly this phrase which is located in one field of the contact.

- Search expression optimization:

  To enhance the program's speed while searching, Contact Search has the query optimization function. This feature removes the redundant elements from the search expression.

  For example:

  If you enter *'Cannon Group'* | *Cannon*, the program will simplify the search expression and will look for *Cannon*.If you enter *'Cannon Group' & Cannon*, the program will search for *'Cannon Group'.*

Incorrect Search Expressions

There are some unacceptable ways of entering search expressions. If you use them, the program will show the **Incorrect Query** warning message. Following are some examples of an incorrect search expression and their explanation:

- *Cannon && Group* – only one logical operator is allowed before every key word.

- *Cannon* <>& *Group* – wrong order of the phrase components.

- *Cannon* | **?* – each key word must contain meaningful characters.

- *@'london light company'* – you may not look for the exact phrase and at the same time ignore the case.

- **? , @&, *&, @** – you may not enter a search expression which consists of the wild cards combination only.

- *@cannon@group* – you may not use wild cards (@) in the middle of a search word.

Search Tips

- If you are not familiar with logical operators, wild cards and syntax rules of Contact Search, use the **Query Details** window to facilitate building a search expression.
- Be careful when entering just a number of words in the **Find What** field. This may cause the system to find too many results.
- If you received too many results, try turning on **Exact Match** (check the corresponding box on the **Contact Search** window).
- If you are not sure about the spelling of the word, do not use the Exact Match function. In this case the program will search for all approximate matches (for example, the words that sound or are spelled alike).
- Try to avoid using the logical **NOT** operator (that is, when the **Exclude** checkbox on the **Query Details** window is checked) in combination with wild cards. It is a time-consuming operation.

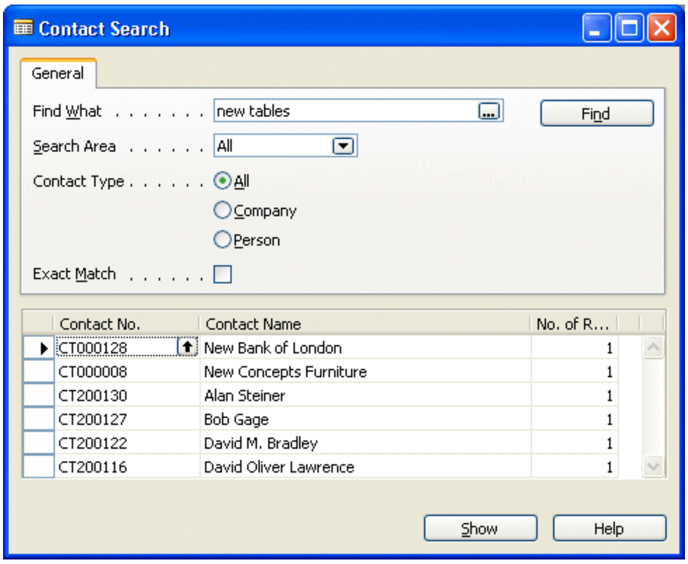
Exercise 3 **Finding a Contact**

You are going to talk to a customer about an opportunity connected with *new tables*. You remember that there is information about this opportunity in the system. Try to find the contact using this information.

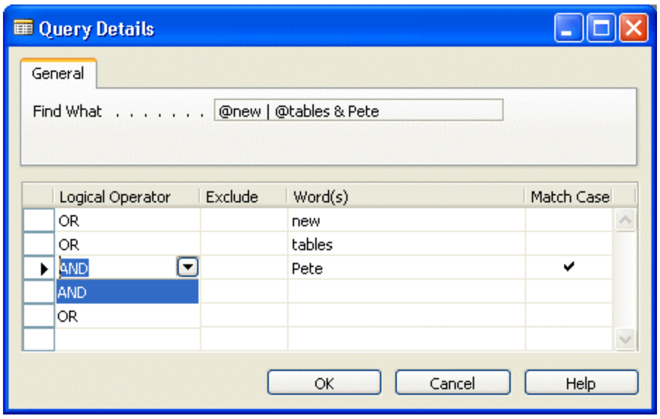
When on the phone, you ask the person to give you his name. You are not sure about the spelling of the last name, but the first name is *George*. Use this additional information to find the contact you need.

Solution

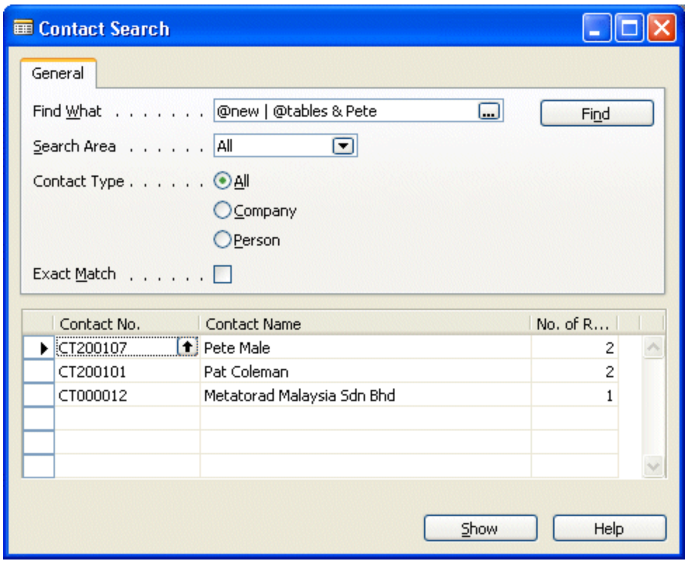
After you have entered "*new tables*" in the **Find What** field, you will get many results:



In order to find the contact you need right now, click the AssistEdit button in the **Find What** field to go to the **Query Details** window. Using the logical **AND** operator, add the word "*Pete*".



In this case you will find the exact contact you need – *Pete Male* from *Furnitures At Work*:


Contact Search
General
Find What
@new | @tables & Pete
Find
Search Area
All
Contact Type
All
Company
Person
Exact Match
Contact No.
Contact Name
No. of R...
CT200107
Pete Male
2
CT200101
Pat Coleman
2
CT000012
Metatorad Malaysia Sdn Bhd
1
Show
Help

4.6 SEARCHING FOR DUPLICATES

If you have inserted a check mark in the **Autosearch for Duplicates** field in the **Relationship Management Setup** window, the program will automatically search for possible duplicates each time you create a new contact company (see chapter 3, “Duplicate Search”).

If you have synchronized contacts with customers, vendors and bank accounts, then when you create a new customer, vendor or bank account, the program automatically creates a new contact, and searches for duplicates.

Searching for Duplicates Manually

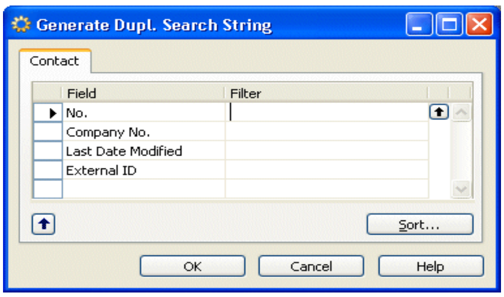
If you have not enabled the automatic search for duplicates in the **Relationship Management Setup** window, you may want to do it manually, for example, after you have created a new contact.

Generating Duplicate Search Strings

The program uses the search strings you have set up in the **Duplicate Search String Setup** window to search for duplicates. In order for the program to accurately search for duplicate contacts, you must generate an updated list of search strings for the contact companies in the program, that is, update search strings for already existing contacts and create search strings for newly created contacts.

You can use the **Generate Duplicate Search String** batch job to manually generate duplicate search strings. To do this, follow this procedure:

1 Click Relationship Management, Periodic Activities, Duplicates, Generate Duplicate Search String.



2 On the **Contact** tab, enter the filters you want to apply to select the contacts you want to generate search strings for.

Note

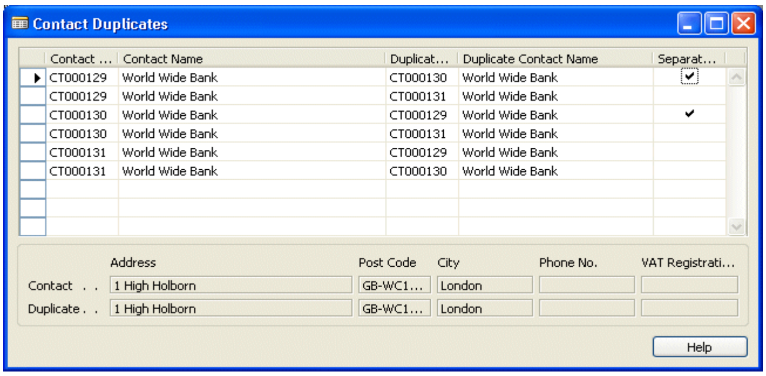
You may want to specify a contact number filter on the Contact tab if you want the program only to generate search strings for one specific contact.

Viewing the Duplicates Found

The program uses the search strings you have generated to search for duplicates. If two contacts have a percentage of search strings equal to or greater than the search hit percent you have defined in the **Relationship Management Setup** window, the program considers the two contacts duplicates.

You can view a list of the duplicates the program has found in the **Contact Duplicates** window.

To open the **Contact Duplicates** window, click Relationship Management, Periodic Activities, Duplicates, Duplicate Contacts.



In the **Contact Duplicates** window, each line represents one possible duplicate. This means that if a contact has, for example, two possible duplicates, the program will show one line for each of them.

Handling Duplicate Contacts

If the two contacts are not true duplicates, but separate contacts, insert a check mark in the **Separate Contacts** field. When you have specified that the contacts are two separate contacts, the program will not take these two contacts into consideration the next time you run a search for duplicates.

If the two contacts are true duplicates, the program does not automatically remove one of them. Therefore, you may want to do this manually. You do so by deleting the contact card of the duplicate contact.

Example: Create a Duplicate Contact

To try the duplicate search function, you must deactivate the autosearch function and then create a duplicate contact. Follow this procedure:

1 Click Relationship Management, Setup, Relationship Mgt. Setup.

2 In the **Relationship Management Setup** window, on the **Duplicates** tab, click the **Autosearch for Duplicates** check box to clear it.

3 Click Relationship Management, Contact Card.

4 Click F3 and create a new contact with the following details:

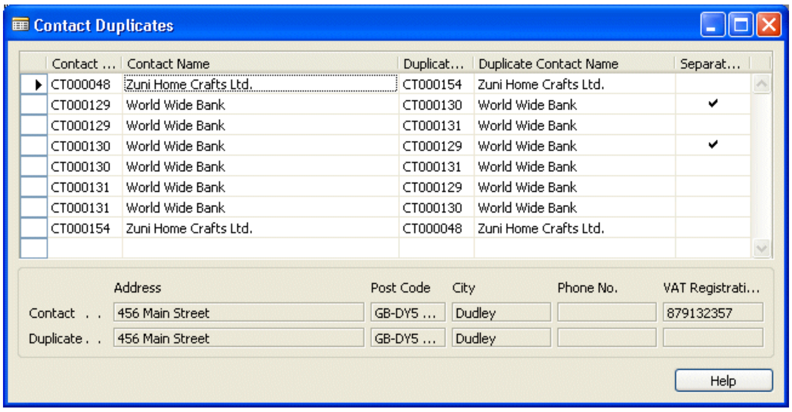
Zuni Home Crafts Ltd.
456 Main Street
GB-DY5-4DJ Dudley

5 Click Relationship Management, Periodic Activities, Duplicates, Generate Duplicate Search String. The **Generate Duplicate Search String** window appears.

6 Click OK.

7 Click Relationship Management, Periodic Activities, Duplicates, Duplicate Contacts.

8 The new contact and the duplicate contact card appear as duplicates in the **Contact Duplicates** window:



4.7 SYNCHRONIZING CONTACTS WITH CUSTOMERS, VENDORS AND BANK ACCOUNTS

If some of your contacts are or become customers, vendors, and/or bank accounts, you can synchronize their contact cards with their customer cards, vendor cards, and/or bank account cards. This means that you only have to modify the information in one place. For example, if a contact is also a customer and you have synchronized the contact card with the customer card, then when you change the address on the contact card, the program automatically updates the customer card.

You may want to synchronize your contacts with customers, vendors, and/or bank accounts in the following cases:

- When a contact becomes a customer, vendor and/or bank account
- When a contact company has been created both as a contact in the Relationship Management application area and as a customer in the Sales & Receivables application area
- When a contact company has been created both as a contact in the Relationship Management application area and as a vendor in the Purchases & Payables application area
- When a contact company has been created both as a contact in the Relationship Management application area and as a bank account in the General Ledger application area

Before you can synchronize contacts with customers, vendor and bank accounts, you must specify a business relation code for customers, vendors and bank accounts in the **Relationship Management Setup** window.

But you can also manually synchronize your contacts with existing customers, vendors and bank accounts by:

- Linking contacts with existing customers, vendors and/or bank accounts
- Creating contacts as customers, vendors and/or bank accounts from the contact card
- Creating contacts from customers, vendors and/or bank accounts

After you have set up the synchronization of contacts with customers, vendors and bank accounts, then each time you create a customer card, a vendor card or a bank account card, the program automatically creates a contact card for the customer, vendor or bank account.

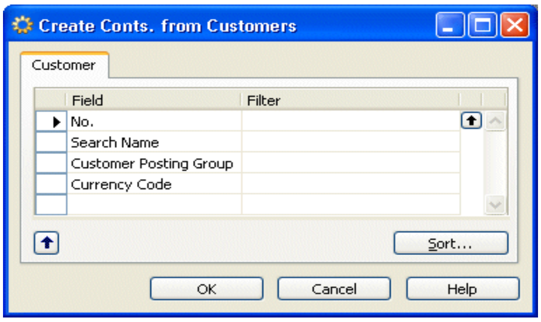
Creating Contacts from Customers, Vendors and Bank Accounts

If you have set up the synchronization of contacts with customers, vendors and bank accounts, then each time you create a customer card, a vendor card or a bank account card, the program automatically creates a contact card for the customer, vendor or bank account in the Relationship Management application area.

If you have created customers, vendors or bank accounts when the synchronization of contacts with customers, vendors and bank accounts was not specified, then the program has not automatically created a contact card for the customer, vendor or bank account. In this case, you can have the program create contacts on the basis of the existing customer, vendor or bank account data.

The following procedure shows how to create contacts from customers. You can create contacts from vendors and bank accounts by following a similar procedure.

1 Click Relationship Management, Periodic Activities, Integration, Create Contacts from Customers. The **Create Contacts from Customers** window appears.



2 Set filters if you only want to create contacts from specific customers.

3 Click **OK** to start creating contacts.

The program automatically assigns the business relation code for customers specified in the **Relationship Management Setup** window to the newly created contact(s).

Creating Customers, Vendors and Bank Accounts from Contacts

As the business relationships you have with your contacts evolve, you may want to record them as customers, vendors and/or bank accounts.

The following procedure shows how to create contacts as vendors. You can create contacts as customers and bank accounts by following a similar procedure.

1. Click Relationship Management, Contacts.

2. Select the contact that you want to create as a vendor and click Functions, Create As, Vendor.

3. Confirm the subsequent message.

The program automatically transfers the contact information from the contact card to the vendor card, but you may also want to add specific vendor information such as invoicing and payment details to the vendor card.

The program automatically assigns the business relation code for vendors to the contact. To see it, on the contact card, click the **Segmentation** tab, and then click the AssistButton to the right of the **No. of Business Relations** field. The **Contact Business Relations** window appears.

If there is a business relation that is no longer relevant, the program does not automatically remove it. You can do this manually in the **Contact Business Relations** window.

Check the **General**, **Communication** and **Foreign Trade** tabs to ensure that the information entered by the program is correct.

Exercise 4 **Creating a Contact as a Customer**

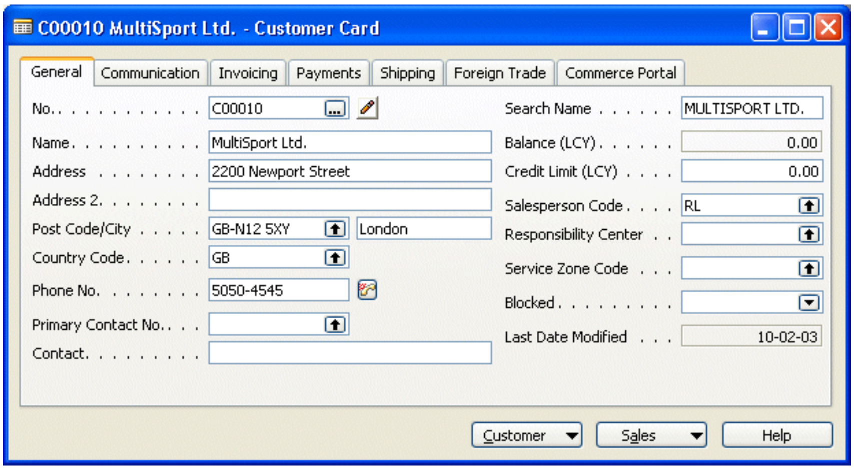
MultiSport Ltd. has decided to place an order with Cronus. You decide to create this contact as a customer.

1. Create MultiSport as a customer.

2. Delete any business relations that no longer apply to MultiSport.

Solution

You should be able to see the new customer card for MultiSport from the contact card by clicking Contact, Customer/Vendor/Bank Acc. The customer card for MultiSport Ltd. should look like this:



Click the **Segmentation** tab and in the **No. of Business Relations** field, check that the Prospect code no longer exists.

Linking Contacts with Existing Customers, Vendors and Bank Accounts

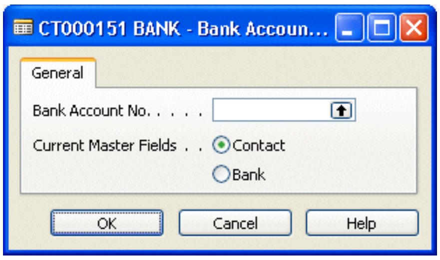
If you have created both a contact card and a bank account card for the same company, you can link the two cards.

The following procedure shows how to link contacts with bank accounts. You can link contacts with customers and vendors by following a similar procedure.

1 Click Relationship Management, Contacts.

2 Select the contact you want to link with an existing bank account and click Functions, Link with Existing, Bank.

3 Fill in the **Bank Account Link** window, and click OK to create the link.



In the **Current Master Fields** field, you specify which fields the program should prioritize in case of conflicting information in fields common to the contact card and the bank account card. For example, if the address is different from one card to the other, you can specify by selecting **Contact** that the valid information is on the contact card.

Exercise 5 **Linking a Bank Account Card to a Contact Card**

1 Create a new contact company by entering the following information:

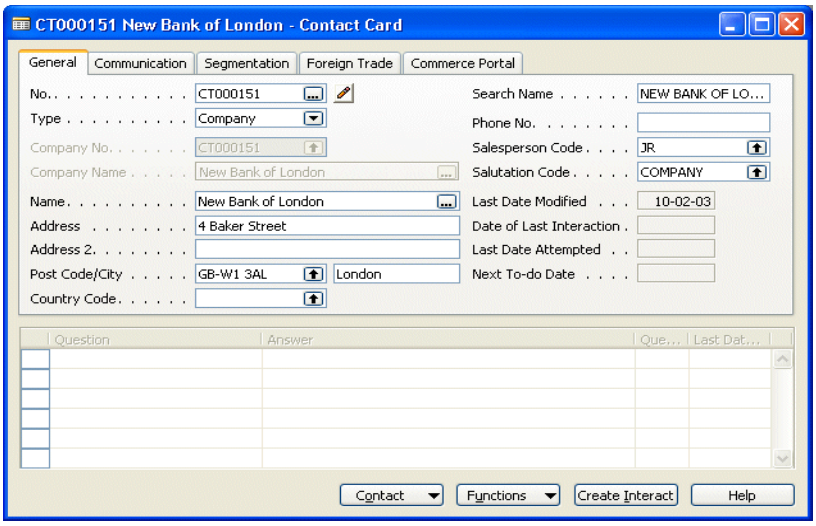
Contact Name: *New Bank of London*

A few months later, you realize that the company is already recorded as a bank account in the General Ledger application area, as the New Bank of London.

2 Link the bank account card for the New Bank of London to the contact card for the bank.

Solution

The contact card for the New Bank of London should now include the details form the bank account card, as in the following picture:



Deleting Contacts, Customers, Vendors and Bank Accounts

If you delete a contact linked to a customer, vendor and/or bank account, only the contact card is removed from the program. The customer card, vendor card or bank account card linked to the contact card remains in the program.

To delete a contact, browse to the relevant contact card, press F4 and confirm the subsequent message.

Exercise 6 **Deleting a Customer Card**

A few months later, Mr Smith at MultiSport has decided not to place an order after all and seems to have lost interest.

1 Delete the customer card for MultiSport, without deleting the contact card.

Solution

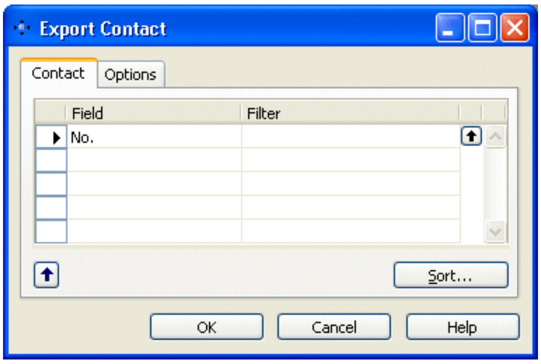
You should no longer be able to see the customer card for MultiSport, but the contact card should still be in the Relationship Management application area.

The program has automatically removed the business relation code for customers from the **Contact Business Relations** window for MultiSport Ltd.

4.8 EXPORTING CONTACTS

You can select a list of contacts from your database and export it to a disk, for example, if you want to send it to an advertising agent.

1 Click Relationship Management, Periodic Activities, Export Contact. The **Export Contact** window appears:



2 On the **Contact** tab, enter any filters necessary to select the contacts you want to export.

3 On the **Options** tab, in the **File Name** field, enter the name and path of the file that you want to contain the contact's data.

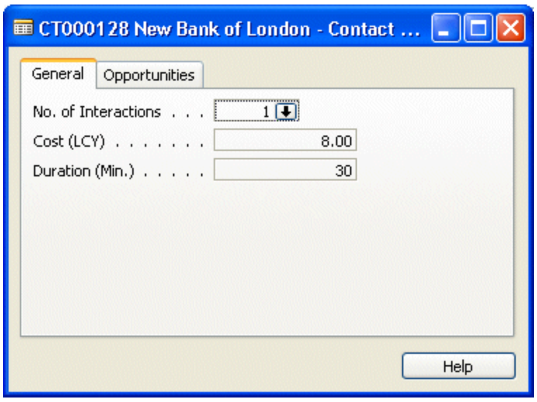
4 Click OK to start exporting.

4.9 CONTACT STATISTICS

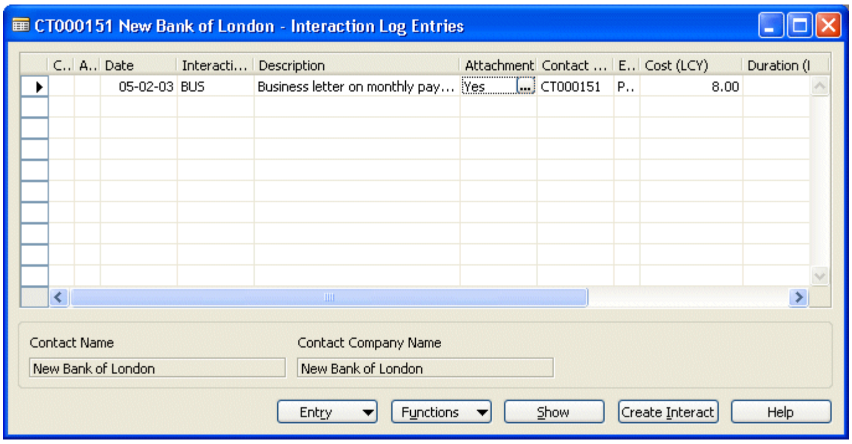
In the **Contact Statistics** window, you can see the key figures concerning your contacts. To open the **Contact Statistics** window, on the contact card, click Contact, Statistics, or press **F9**.

The General Tab

In the **Contact Statistics** window, on the **General** tab, you can see information about the interactions involving the contact. This includes the number of interactions involving the contact, as well as their total cost and duration.



Click the AssistButton to the right of the **No. of Interactions**, **Cost (LCY)** and **Duration (Min.)** fields to see a list of these interactions in the **Interaction Log Entries** window.

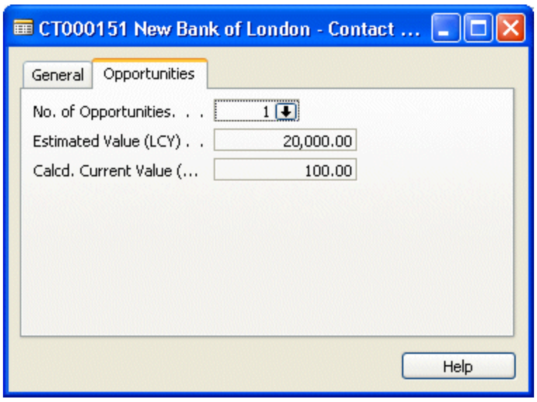


In the **Interaction Log Entries** window, the program displays one line for each interaction involving the contact. You can see details about each interaction in the different fields of the window. For example, the **Evaluation** field contains the evaluation of the interaction.

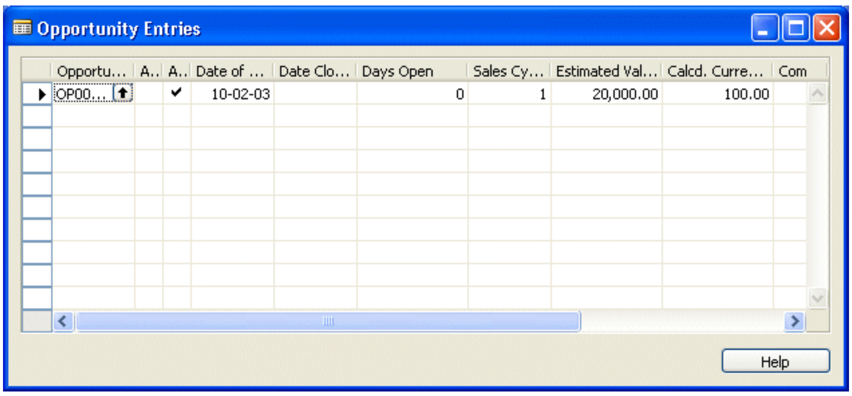
You can also find information about the last interactions involving the contact on the contact card in the **Last Date of Interaction** and **Last Date Attempted** fields.

The Opportunities Tab

On the **Opportunities** tab, you can see information about the opportunities involving the contact. This includes the number of opportunities involving the contact, as well as their total estimated value and current calculated value. The estimated value is the value entered by the salespeople as the estimated value of the opportunity. The current calculated value is the value that the program calculates based on the estimated value and the probability for the opportunity resulting in a sale.



Click the AssistButton to the right of the **No. of Opportunities**, **Estimated Value (LCY)** and **Current Calc. Value (LCY)** fields to see a list of the opportunity entries in the **Opportunity Entries** window.



4.10 Contact Reports

You can use the reports in the Relationship Management application area to view and print information concerning your contacts, salespeople, teams, to-dos, opportunities, campaigns, profile questionnaires and segments.

There are seven contact-specific reports:

The Contact - List Report

With this report, you can print a list of all or some of your contacts. The report provides details about each contact as well as related opportunities and to-dos, and includes the following information:

- The number, name, address and type of the contact
- The number of opportunities involving the contact, as well as their total estimated value and calculated current value
- The total cost and duration of the interactions involving the contact
- The next to-do date

The Contact - Company Summary Report

In this report, you can print overall information about contact companies. The report provides details about the company, related interactions and to-dos, and includes the following information:

- The number, name and address of the contact company
- A list of the to-dos involving the contact company, including their number, description, date, type, priority, status, and the code of the salesperson or team handling the to-do
- A list of the interactions involving the contact company, including their entry number, description, date, initiator, information flow, the salesperson handling the interaction and the number of the to-do that the interaction is linked to

The Contact - Person Summary Report

In this report, you can print overall information about contact people. The report provides details about the person, related interactions and to-dos, and includes the following information:

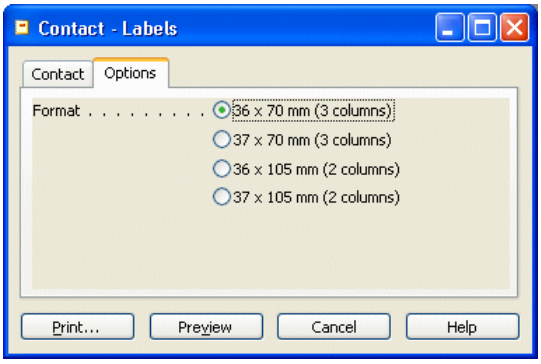
- The number, name and address of the contact person
- A list of the to-dos involving the contact person, including their number, description, date, type, priority, status, and the code of the salesperson or team handling the to-do
- A list of the interactions involving the contact person, including their entry number, description, date, initiator, information flow, the salesperson handling the interaction and the number of the to-do that the interaction is linked to

The Contact - Labels Report

In this report, you can print labels with the contacts' names and addresses. The report can be used when sending sales and marketing campaign letters, for example.

To open this report, click Relationship Management, Reports, Contact-Labels.

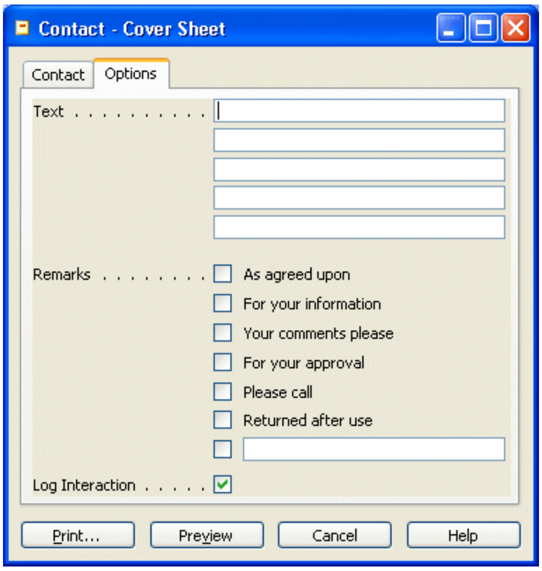
On the **Options** tab, you can select the format you want to use when printing labels for your contacts.



The Contact - Cover Sheet Report

In this report, you can print cover sheets to send to one or more contacts. To open the report, Click Relationship Management, Contacts. On the contact card, click Functions, Print Cover Sheet.

On the **Options** tab, in the **Text** field, you can enter the text that you want to appear on the cover sheet. In the **Marks** field, insert a check mark before the relevant option, and/or select the last option to enter your own comment.



The program automatically inserts a check mark in the relevant option on the printed cover sheet.

4.11 EXERCISE

1 Create the following contact company in the program:

Rent-a-Bike
123 Main Street
GB-E125TG Edinburgh
Phone No.: *444-555* Fax No.: *444-666*

Activities: bicycle renting
VAT Registration No.: *123 654 789*

2 After you have created the company, enter the following contact person for that company:

Rent-a-Bike

Eric Davis

Manager

GB-E12 5TG Edinburgh

Phone No.: 444-556 Mobile Phone No.: 222-333

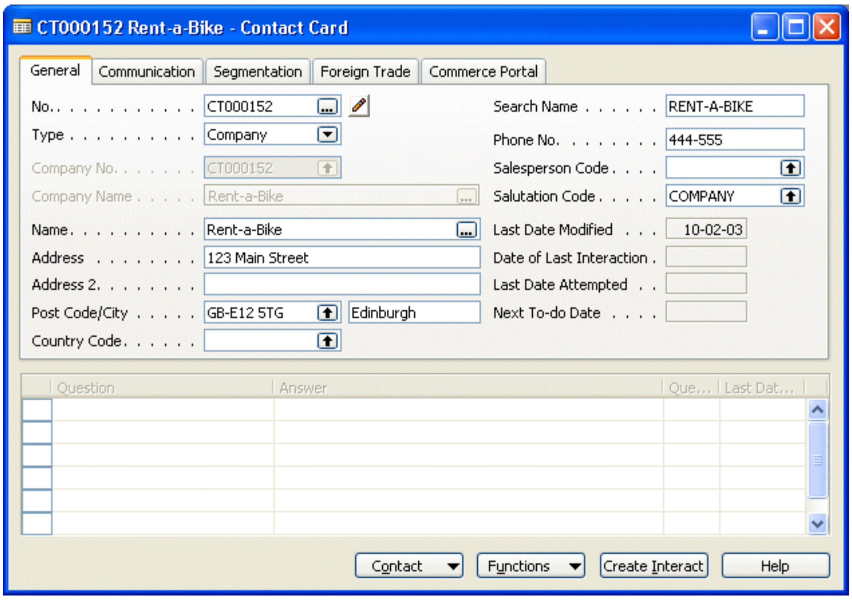
3 Rent-a-Bike has now become a customer. Record this contact company as a customer and update the business relation.

4 Create Rent-a-Bike as a vendor.

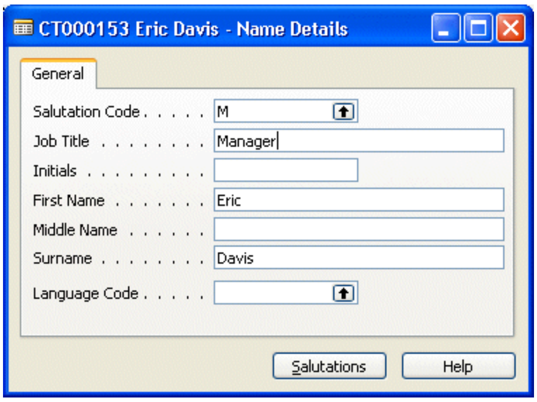
5 Delete the vendor card you have created for Rent-a-Bike.

Solutions

The contact card for Rent-a-Bike should look like this:



The **Name Details** window for Eric Davis should look like this:



There should be a customer card for Rent-a-Bike, with just the customer business relation assigned to it, but a vendor card for Rent-a-Bike should no longer exist.

4.12 SELF-TEST

Try entering different types of almost-duplicate contacts and run the duplicate check. Think about the different ways duplicates could be entered in your organization (such as typos, someone entering a new contact without checking whether it already exists, and so on).

Chapter 5

Interactions and Document Management

This chapter contains the following sections:

- Introduction
- Setting Up Interactions
- Using the Create Interaction Wizard
- Phone Calls
- E-Mails
- Automatically Recorded Interactions
- Canceling and Deleting Interaction Log Entries
- Interaction Statistics
- Exercises

5.1 INTRODUCTION

In the Relationship Management application area, you can record all the types of communications you have with your contacts, for example, correspondence, meetings, sales and purchase documents, and so on. This enables you to effectively keep track of the sales and marketing efforts that you direct at your contacts, and thus improve the quality of your business interactions.

In Navision, interactions are all the types of communications between your company and your contacts. For example, letters, faxes, e-mails, invoices, telephone calls, meetings, and so on. You can create interactions using the **Create Interaction** wizard.

There are several ways of recording your interactions:

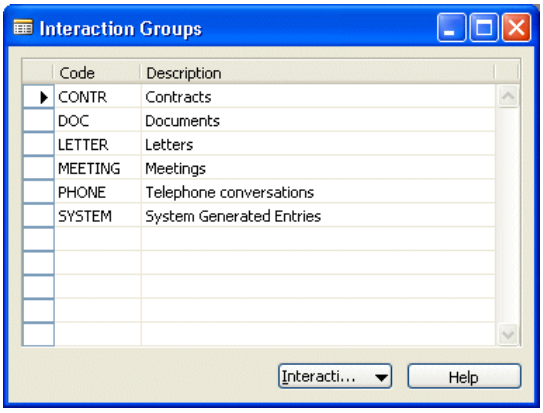
- You can create interactions linked to a single contact using the Create Interaction wizard.
- You can create and log interactions linked to several contacts from the Segment window.
- You can have the program automatically record interactions when you perform specific actions in Navision.

5.2 SETTING UP INTERACTIONS

You can use interaction groups to store the interaction templates that you use to create interactions. For example, you can create an interaction group to store all your letters, another one for your price lists, and so on. Interaction groups are mainly used to view statistics for a group of interaction templates. For example, you can see how many times you have used a particular interaction template or interaction group to create interactions.

Setting Up Interaction Groups

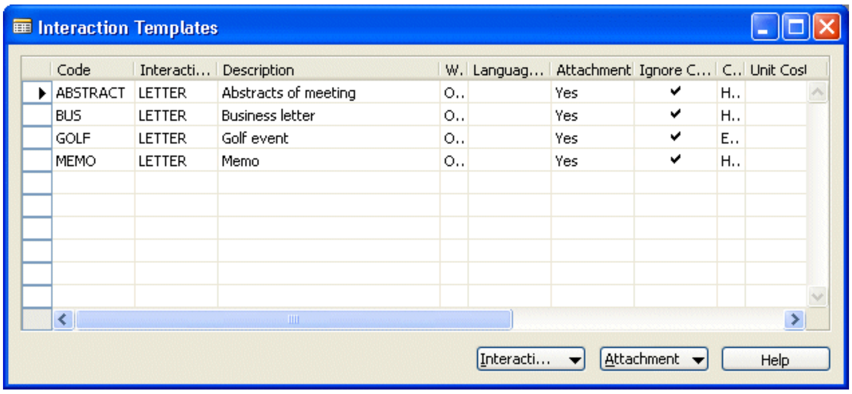
You can set up interaction groups in the **Interaction Groups** window. To open the **Interaction Groups** window, click Relationship Management, Setup, Interaction, Interaction Groups.



You identify interaction groups by entering a unique code and description for each interaction group.

You can view a list of the interaction templates belonging to each interaction group. For example, to view a list of the interaction templates belonging to the Letters interaction group, select the *Letter* interaction group and click Interaction Group, Interaction Templates.

The **Interaction Templates** window appears, containing only the templates that belong to the Letter interaction group.



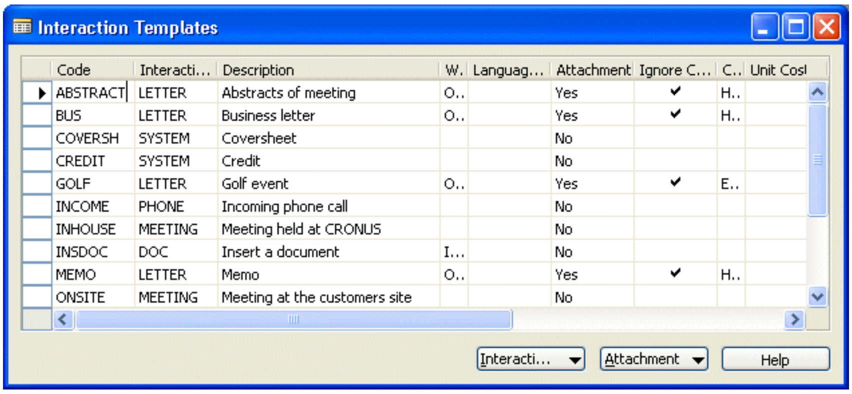
Creating Interaction Templates

Interaction templates are the models you use to create interactions. They can include attachments, for example, Microsoft Word documents, Microsoft Excel files, and so on.

In order for the program to record your interactions in the **Interaction Log Entry** table, you must specify an interaction template when you create an interaction.

To create a new interaction template, follow this procedure:

1 Click Relationship Management, Setup, Interaction, Interaction Templates.



2 Press F3 to enter a new template.

3 Fill in the **Code** and **Description** fields.

4 If you want to assign the interaction template to an interaction group

(for statistical purposes, for example), in the **Interaction Group Code** field, select the interaction group that you want the interaction template to belong to.

5 In the **Unit Cost (LCY)** field, enter the usual cost for this type of interaction.

6 In the **Unit Duration (Min.)**, enter the usual duration for this type of interaction.

7 In the **Initiated By** field, specify who usually initiates this type of interaction. There are two options: *Us* and *Them*. Select *Us* if the interaction is usually initiated by your company. Select *Them* if the information is usually initiated by your contacts.

8 In the **Information Flow** field, specify the information flow of this type of interaction. There are two options: *Outbound* and *Inbound*. Select *Outbound* if the information is usually sent by your company. Select *Inbound* if the information is usually received by your company.

When you create an interaction using the **Create Interaction** wizard or from the **Segment** window and you select an interaction template, the program automatically uses the contents of the fields in the **Interaction Templates** window as default values for the interaction.

Entering Campaign-Specific Information

If you always use the same interaction template to create interactions linked to a specific campaign, you can link the interaction template to the campaign. You do this by specifying a campaign code in the **Campaign Code** field in the **Interaction Templates** window. The program automatically links the interactions you create, using the interaction template, to the specified campaign.

If the contacts involved in the interactions created using the interaction template are usually the target of a campaign, place a check mark in the **Campaign Target** field.

If you intend to use the interaction template to record interactions that are a response to a campaign, place a check mark in the **Campaign Response** field.

Assigning Attachments to Interaction Templates

You can insert attachments in the interaction templates. Attachments can be all types of documents, for example, Microsoft Word documents, Microsoft Excel files, text files, and so on. However, Navision is only fully integrated with Microsoft Word. This means that you can only create Microsoft Word documents from within Navision; you cannot create Microsoft Excel files or other types of attachments directly from within Navision.

There are several ways of assigning attachments to interaction templates. You can:

- create Microsoft Word documents.
- import all types of documents.
- copy already existing attachments from other interaction templates.

Creating Microsoft Word Documents

If you have Microsoft Word 2002 installed, you can create attachments (Microsoft Word documents only) from the **Interaction Templates** window. To create a standard letter, follow this procedure:

1 In the **Interaction Templates** window, select the interaction you want to create an attachment for, and click Attachment, Create.

The program automatically launches Microsoft Word, and opens a new document.

When you create Microsoft Word documents as attachments from within Navision, the new document that appears contains mail merge fields from the program, for example, the contact number, name, address, and so on. You can select these fields from the **Merge Fields** field in the Microsoft Word window, and insert them at the relevant place in the document.

1 In the new Microsoft Word document, enter the main text of your documents and select the relevant merge fields.

2 Close the document. A dialog box appears in which you must click Yes to confirm.

Only the Microsoft Word document that you have opened from within Navision is linked to the program. If you create a new Microsoft Word document from within Microsoft Word, then even if you open it from the document linked to Navision, the new document is not linked to Navision. If you want to link this new document to an interaction template or an interaction in the program, you must import the new document.

Note

You can insert only one attachment in each interaction template. Consequently, you cannot create an attachment for an interaction template already containing an attachment. If the interaction template contains an attachment, when you click the AssistButton to the right of the Attachment field, the program opens the assigned attachment.

Closing Microsoft Word

The documents that you open from Navision are independent from the other Microsoft Word documents that you have opened before or while the document linked to the application is open. This means that if you close Microsoft Word from a document that is not linked to Navision, the program will not close the open Microsoft Word document linked to Navision.

When you close Microsoft Word from the document linked to Navision, a dialog box appears where you are asked if you want to save the changes made in the document and import the document again into the program.

Note

When you are working in a Microsoft Word document opened from within Navision, you cannot return to work in the program before you have closed Microsoft Word.

Saving Microsoft Word Documents

If you save the Microsoft Word document linked to Navision, the program records the changes in the document. However, when you close Microsoft Word, you will be asked again if you want to save the changes and import the document into the program.

This means that you can open a Microsoft Word document (attachment) from within Navision, make changes in the document, save it on a disk file, and import the document again into the application with the changes made. If you do not import the document into Navision again, the changes you have made will not be saved in the attachment.

Note

When working in the Interaction Templates window, if two or more users open and modify an interaction template attachment (Microsoft Word document) at the same time, the program will only save the changes made by the first user to import the document into Navision again. The changes made by the other user(s) will not be recorded.

Exercise 7 Create an Interaction Template with an Attachment

Create an interaction template for the follow-up letters that you send after your first meeting with a contact.

Additional information:

Code: FOLLOWUP

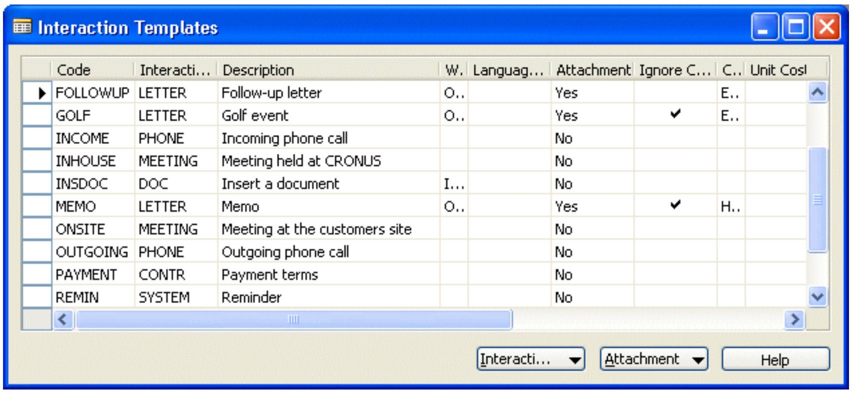
Unit Cost: *10 LCY* **Unit duration**: *10 min*

You usually send this letter by e-mail.

The interaction template belongs to the *Letter* interaction group. The attachment is a Microsoft Word document. Create it including the following merge fields: the contact's name and e-mail address, and the salesperson's name and telephone number.

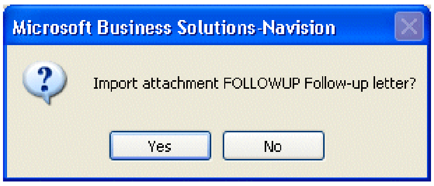
Solution

When you have created the interaction template and the attachment, the **Interaction Templates** window should look like this:



Code	Interacti...	Description	W.	Languag...	Attachment	Ignore C...	C..	Unit Cost
FOLLOWUP	LETTER	Follow-up letter	O..		Yes		E..	
GOLF	LETTER	Golf event	O..		Yes	✔	E..	
INCOME	PHONE	Incoming phone call			No			
INHOUSE	MEETING	Meeting held at CRONUS			No			
INSDOC	DOC	Insert a document	I...		No			
MEMO	LETTER	Memo	O..		Yes	✔	H..	
ONSITE	MEETING	Meeting at the customers site			No			
OUTGOING	PHONE	Outgoing phone call			No			
PAYMENT	CONTR	Payment terms			No			
REMIN	SYSTEM	Reminder			No			

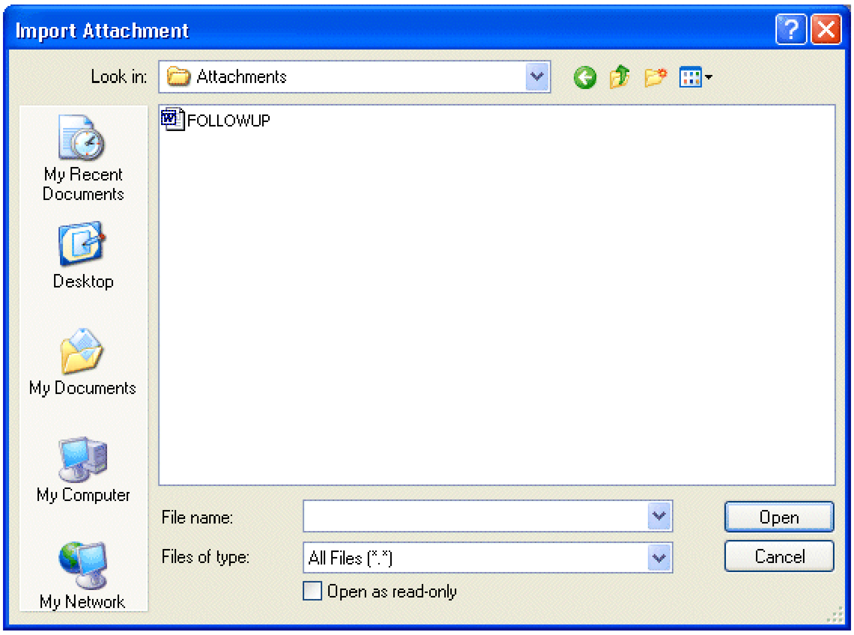
When you have finished creating the Word document and you close the document, this message appears:



Importing Attachments

Instead of creating new documents, you can import documents from disk files into Navision. You may want to do this if you want to use a document that you have already created. For example, you may want to attach a Microsoft Excel file. You must create it and save it on a disk file, and then import it into Navision.

To import attachments to interaction templates, in the **Interaction Templates** window, click Attachment, Import. The **Import Attachment** window appears.



Select the path, drive, and file name of the attachment you want to import, and click Open. The program imports the document.

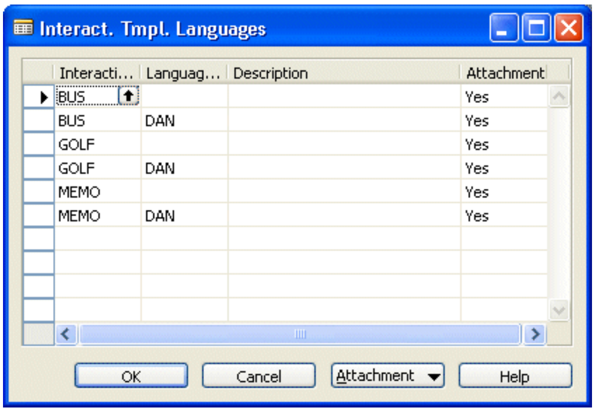
Copying Attachments

You can also insert attachments in interaction templates by copying the attachments assigned to other interaction templates. To copy attachments from one interaction template to another, follow this procedure:

1 In the **Interaction Templates** window, select the interaction you want to copy the attachment to.

2 Click Attachment, Copy From.

3 The **Interact. Templ. Languages** window appears showing a list of all the interaction templates, in different languages, that contain attachments.



4 Select the interaction template containing the attachment that you want to copy, and then click OK.

Attachment-Specific Information in the Interaction Templates Window

When an interaction template contains an attachment, the **Attachment** field contains *Yes*. The **Attachment** field is not editable. If the **Attachment** field contains *Yes*, when you click the AssistButton to the right of the field, the program opens the document.

In the **Correspondence Type** field, you can specify how the attachment contained in the interaction template is usually communicated to contacts. There are three options: **Fax**, **E-Mail** and **Hard Copy**. If you have filled in this field, the program automatically fills in the **Correspondence Type** field in the **Create Interaction** wizard or in the **Segment** window when you create an interaction.

In the **Wizard Action** field, you can specify the action that you want the program to perform when you click Next in the first window of the **Create Interaction** wizard. There are three options:

- Blank: If you select this option, the program immediately displays the second window of the wizard when you click Next.
- Open: If you select this option, the program will open the attachment when you click Next.
- Import: If you select this option, the program will import the attachment when you click Next.

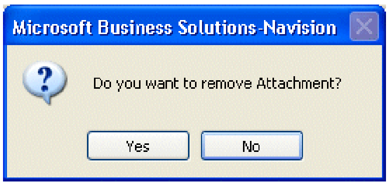
Removing Attachments from Interaction Templates

You can remove attachments assigned to interaction templates, for example, if the document is not used anymore, and you would like to replace it.

To remove attachments from interaction templates, follow this procedure:

1 Click Relationship Management, Setup, Interaction, Interaction Templates. The **Interaction Templates** window appears.

2 Find the interaction template containing the attachment that you want to delete and click Attachment, Remove.



3 Confirm the subsequent message.

The program removes the attachment.

Note

Removing the attachment from an interaction template does not affect the attachments included in the interaction log entries that you have created using the template. You can still open these attachments from the Interaction Log Entries window.

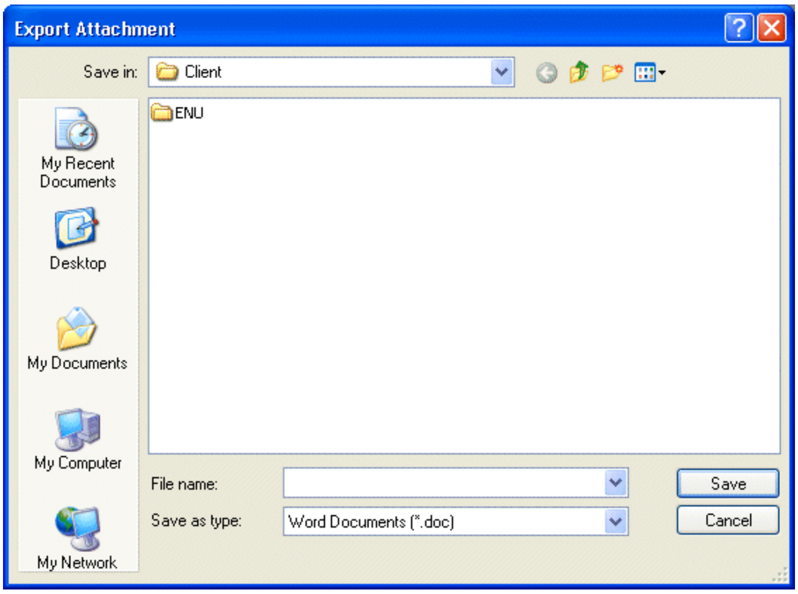
Exporting Attachments

You can export the attachments contained in interaction templates to a disk file, for example, if the attachment is a Microsoft PowerPoint presentation that you would like to have on a disk.

To export an attachment, follow this procedure:

1 In the **Interaction Templates** window, select the interaction template containing the attachment you want to export.

2 Click Attachment, Export. The **Export Attachment** window appears:



3 Select the drive, path, and file where you want to export the attachment to, and then click OK.

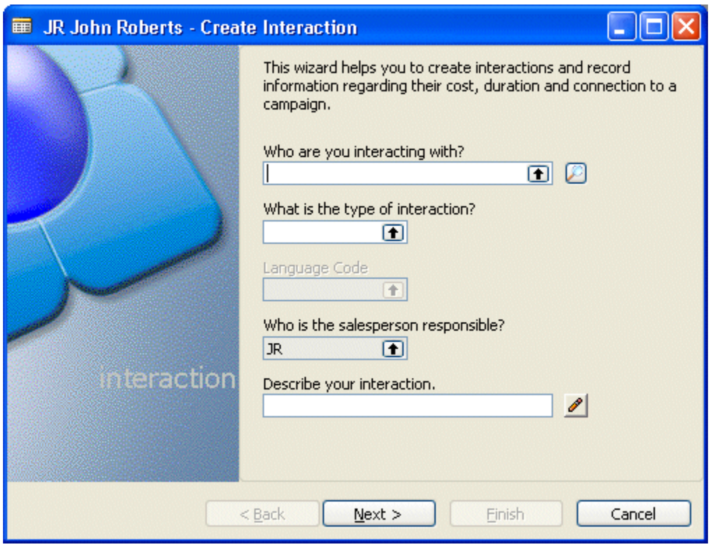
The program exports the attachment.

5.3 USING THE CREATE INTERACTION WIZARD

You can create interactions involving single contacts using the **Create Interaction** wizard.

The Create Interaction Wizard

You can open the **Create Interaction** wizard from the contact card or the salesperson/purchaser card by clicking Create Interact.



Mandatory Information

When you create interactions using the **Create Interaction** wizard, you must specify the following information:

- The name of the contact involved in the interaction
- The code of the interaction template you want to use (see below)
- The salesperson/purchaser responsible for the interaction
- The description of the interaction
- The date of the interaction

The program automatically enters the values assigned to the interaction template by default, but you can change them.

Optional Information

- Correspondence type – if the interaction contains an attachment, you can enter a correspondence type in this field. There are four options: <blank>, *Hard Copy*, *E-Mail*, and *Fax*. If you select *Hard Copy*, when you click Finish, the program automatically prints the attachment. If you select *E-Mail*, when you click Finish, the program automatically sends the attachment by e-mail. If you select *Fax*, and if your program is integrated with a fax, the program automatically sends the attachment by fax. If you leave this field blank, the program will not send or print the attachment. You can use this option, for example, if you have already printed or sent the attachment before you recorded the interaction.

- Campaign number – you can link the interaction to a campaign and when you click Finish, the program automatically records the interaction as a campaign entry for the specified campaign.

Importing Attachments

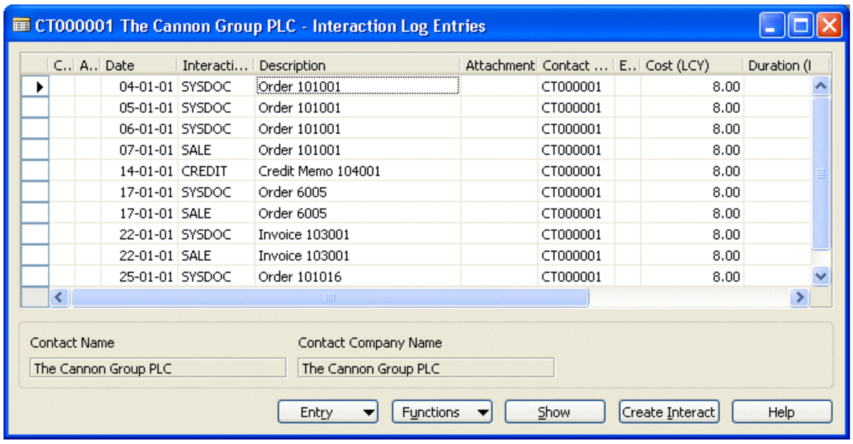
If you have chosen an interaction template that does not include an attachment, but for which the option *Import* has been selected in the **Wizard Action** field in the **Interaction Templates** window, then when you click Next in the first window of the wizard, a dialog box appears where you can select the drive and path to the attachment that you want to import.

This enables you, for example, to record received letters as interactions. To do this, you must scan the letter you have received, and then import it from the **Create Interaction** wizard. After having recorded the interaction, you can find the scanned letter as the attachment for that interaction in the **Interaction Log Entries** window.

Recording the Interaction

When you click Finish in the **Create Interaction** wizard, the program automatically records the interaction in the **Interaction Log Entry** table. You can see the interaction you have created in the **Interaction Log Entries** window for the contact.

For example, to see the interactions involving The Cannon Group, on the contact card, click Contact, Interaction Log Entries. The **Interaction Log Entries** window for The Cannon Group appears.



In the **Interaction Log Entries** window, you can see a list of all the interactions involving the contact. In this window, you can also see detailed information about the interactions, for example, their cost, duration, and the salesperson that handled them. If the interaction contains an attachment, you can view it by clicking the AssistButton to the right of the **Attachment** field. This enables you, for example, to view the letters and other documents you have sent to your contacts.

Depending on where you open it from, the **Interaction Log Entries** window displays different information. For example, if you open **the Interaction Log Entry** window from the contact card, it will display the interaction log entries for that particular contact.

Exercise 8 Recording Interactions

You have just come back from a meeting with John Smith at MultiSport, where you presented your new line of bicycles to him. The meeting went well.

1 Record the interaction using the ONSITE interaction template and including your evaluation of the meeting.

One week after the meeting, you decide to send a follow-up letter to John Smith to ask him whether he would like to receive further information concerning the line of bicycles.

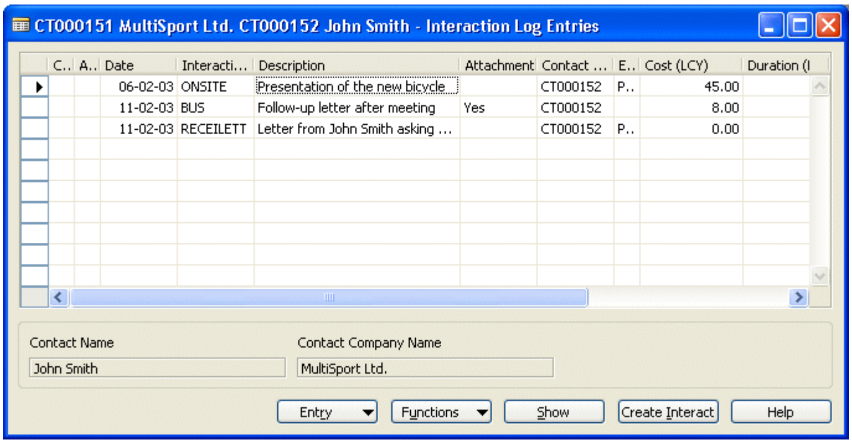
2 Use the interaction template called *Business Letter* to have the program automatically print the letter and record the interaction.

You have received a letter from John Smith asking you to send him a sales quote for 50 bicycles. It is a company policy at Cronus to record all interactions that you have with your contacts. Consequently, you would like to import the letter you have received from John Smith and record it as an interaction.

3 In Microsoft Word, write a fictitious letter and save it on your disk drive. Use the *Received Letter* interaction template.

Solution

The **Interaction Log Entries** window should now display three interactions involving John Smith.



Find the letter in the **Interaction Log Entries** window, in the line containing the interaction recording the letter, by clicking the AssistButton to the right of the **Attachment** field. The program automatically launches Microsoft Word and opens the letter.

5.4 PHONE CALLS

You can also record phone calls as interactions in the program.

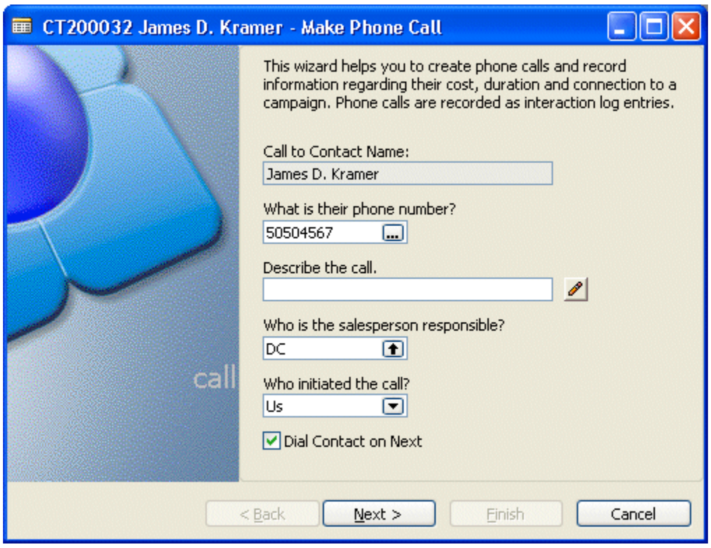
Making Phone Calls

Before you can record phone calls as interactions in the program, you must ensure that the interaction template code for outgoing phone calls has been selected in the **Outgoing Calls** field on the **Interactions** tab of the **Relationship Management Setup** window. Then follow this procedure:

1 Click Relationship Management, Contacts.

2 Browse to the relevant contact card for the contact and click the **Communication** tab.

3 Click the telephone icon to the right of the **Phone No.** field. The **Make Phone Call** wizard appears.



4 Enter a description of the call.

5 Click Next.

A dialog box appears, indicating that the program is currently dialing the contact's number. If you can't reach the contact, for example, if the line is busy, click Hang Up.

6 When the phone conversation is over, click Hang Up.

If you are not able to get through to the contact, then in the second window of the wizard, click to remove the check mark in the **Attempt was successful** field.

Note

If you go back to the first window of the wizard (by clicking Back in the second window), the program automatically removes the check mark in the Dial Contact On Next field, so that it does not dial the contact's number once again when you click Next. However, if you want to call the contact again, click the field to insert a check mark.

7 Click Finish.

When you click Finish, the program records this interaction in the **Interaction Log Entry** table.

Exercise 9 **Making a Phone Call**

The warehouse manager has just informed you that, due to a low level of stocks, the delivery of the bicycles ordered by MultiSport will be delayed by two weeks.

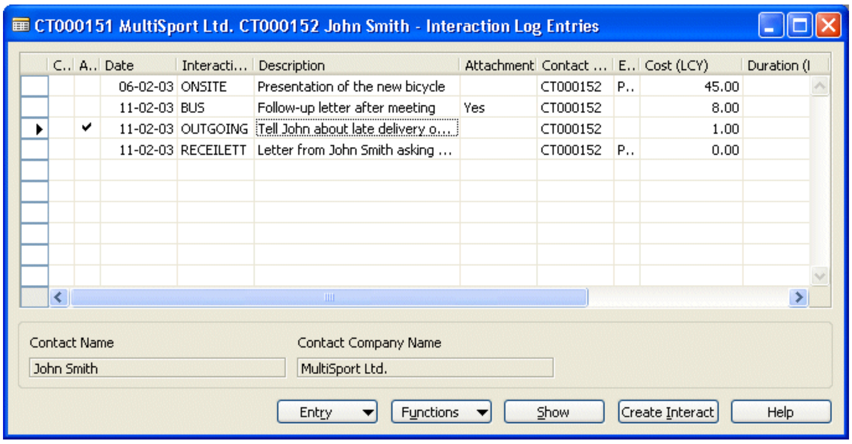
1 Call John Smith to let him know.

John Smith is not in his office. You leave a message with his secretary.

2 Record the interaction.

Solution

You should be able to view the interaction you have just created in the **Interaction Log Entries** window for John Smith.



Note the check mark in the **Attempt Failed** field, which indicates that your attempt to talk to John failed.

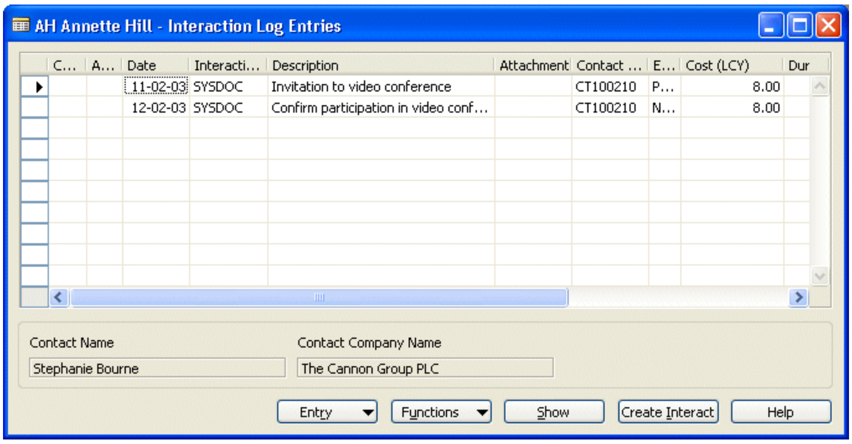
5.5 E-MAILS

Exchanging e-mails with your business contacts is probably an important part of your daily tasks.

If you have Outlook installed, you can send your e-mails from Navision through Outlook. This is an easy and quick way to communicate with your contacts (customers, vendors, and so on).

You can have all your e-mails logged as interactions in the interaction log and thereby share knowledge with your colleagues about any e-mail correspondence going on with your external contacts. This allows other members of the organization to follow up on e-mail correspondence.

From the **Interaction Log Entries** window, you can open mails and view their contents if you click Show.



Before you can log e-mails, certain parameters must be set up correctly (see chapter 3, "E-Mail Logging").

This section describes how you send and receive e-mails and have them logged in Navision.

Sending E-Mails

There are two ways of sending e-mails to your contacts from Navision: you can click the envelope icon to the right of the **E-Mail** field on the **Communication** tab on the contact card and then go through the **Create Mail** wizard; or you can use the **Create Interaction** wizard and select *E-Mail* in the **Correspondence Type** field.

When you send e-mails, the e-mail becomes the attachment in the **Interaction Log Entries** window, and the description you entered on the first page of the wizard becomes the subject of the e-mail.

If you want the e-mail to be logged in the interaction log, you must set up rules in Outlook that define which e-mails will be stored in the **Navision Queue** folder you specified in the **Queue Folder Name** field (Relationship Management Setup, the **E-Mail Logging** tab).

Receiving E-Mails

Incoming e-mails are received in your Outlook Inbox and, depending on the rules you have set up for received e-mails, they will be copied to the queue folder you specified in the **Queue Folder Name** field (Relationship Management Setup, the E-Mail Logging tab).

To have your e-mails logged in the Interaction Log you must specify a queue folder name and set up the rules that Outlook should apply to have the e-mails copied to the **Navision Queue** folder. (For further details, refer to the *Technical White Paper – E-Mail Logging for MS Exchange Server*).

If you want to see the contents of the mail, click Show in the **Interaction Entries Log** window.

Exercise 10 **Sending an E-Mail**

As you were unable to talk to John, you decide to send him an e-mail. You find the e-mail address on the contact card (**Communication** tab) for John Smith: John@multisport.co.

Create an e-mail to send to him, informing him of the delayed delivery:

Subject: *Delayed delivery of ordered bikes*.

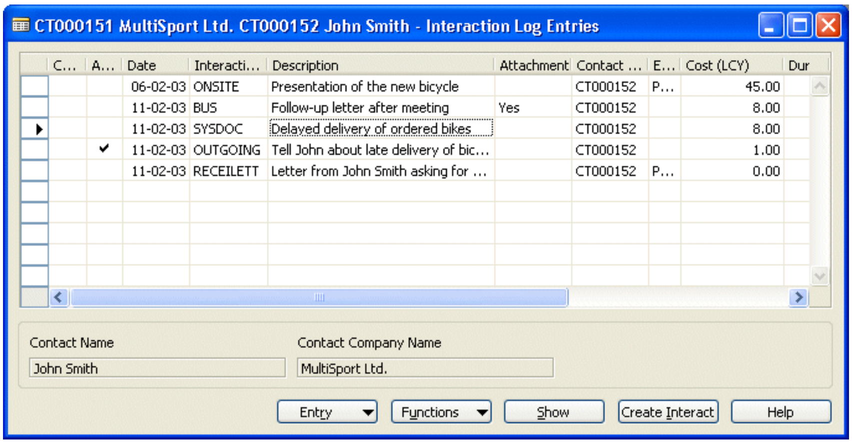
Dear John,

Due to stock problems, the delivery of the bikes you have ordered will be delayed by two weeks.

Best regards,

Solution

You should be able to view the interaction you have just created in the **Interaction Log Entries** window for John Smith.



5.6 AUTOMATICALLY RECORDED INTERACTIONS

You can have the program automatically record the sales, purchase and service documents that you print for your contacts as interactions. You can do this only if the contact is also recorded in the program as a customer, vendor, or bank.

For example, if a contact is also recorded as a customer, you can create a sales quote from the contact's customer card, and you can have the program automatically record an interaction when you print the sales quote.

When you perform certain sales, purchase and service actions in Navision for a customer or vendor that is also recorded as a contact, the program automatically records the action as an interaction for the contact in the Relationship Management application area.

The program records interactions when you do the following:

- Print sales and purchase quotes
- Print sales and purchase orders
- Print sales and purchase invoices
- Print sales and purchase blanket orders
- Print sales reminders
- Print sales statements
- Print sales and purchase credit memos
- Print sales shipment notes
- Print purchase receipts
- Create sales service orders
- Post sales service orders
- Print sales return orders and return receipts
- Print sales finance charge memos
- Print purchase return shipments and return order confirmations

- Print service contracts, contract quotes and quotes

You can see the interactions that the program has automatically created for a contact in the contact's **Interaction Log Entries** window.

Example: Creating Sales Quotes for Customers

You can create sales documents for contacts that are also recorded in the program as customers.

1 To open the customer card, click Relationship Management, Contacts and browse to the relevant contact card. Click Contact, Customer/Vendor/Bank Acc. The customer card appears.

Before you can create a sales quote for a customer, you must ensure that posting groups have been specified. To do this, on the **Invoicing** tab, in the **Gen. Bus. Posting Group, Gen. VAT Posting Group,** and **Customer Posting Group** fields, select the appropriate posting groups.

2 Click Sales, Quotes. The **Sales Quote** window appears.

3 In the **No.** field, press Enter to have the program automatically enter the next available sales quote number.

4 Fill in the lines with the item and quantity.

5 Click Print to print the sales quote. The **Quote** window appears.

6 Fill in any filters on the **Sales Quote** tab and the number of copies you want printed on the **Options** tab.

7 Click Print.

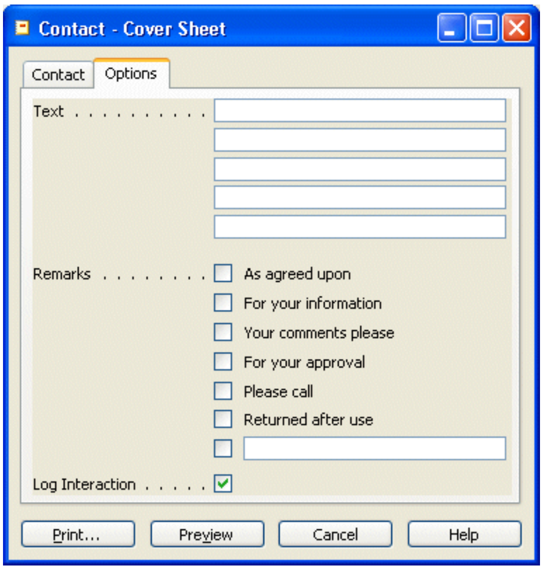
When you click Print in the **Quote** window, the program automatically records the sales quote as an interaction for the contact. You can view it in the **Interaction Log Entries** window for the contact by selecting the line with the quote and clicking Show.

Printing a Contact Cover Sheet

The program also automatically records interactions when you print cover sheets for your contacts.

1 On the contact card for your contact person, click Functions, Print Cover Sheet. The **Contact - Cover Sheet** window appears.

2 Click the **Options** tab.



3 Fill in the **Text** and **Remarks** fields as desired.

4 Click Print.

When you click Print, the program automatically records a new interaction for the contact person. You can view it in the **Interaction Log Entries** window for the contact.

If you do not want to log an interaction when printing a cover sheet, clear the **Log Interaction** check box on the **Options** tab in the **Contact - Cover Sheet** window.

Exercise 11 Creating Automatically Recorded Interactions

In his letter, John Smith asked you to send him a sales quote for 50 bicycles (item number 1000).

1 Set up the customer card for Multisport so that you can create the quote, then create a sales quote and view the interaction created.

Use the following information:

Gen. Bus. Posting Group: *EU*

Gen. VAT Posting Group: *EU*

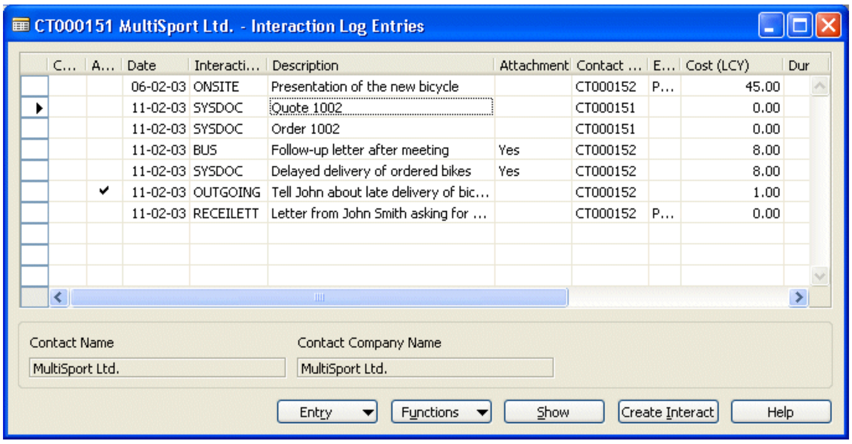
Customer Posting Group : *Domestic*

Four days later, John Smith informs you that he would like to order the 50 bicycles.

2 Create a sales order for this.

Solution

The **Interaction Log Entries** window for MultiSport should now look like this:



You can view the sales order from the **Interaction Log Entries** window by selecting the line with the order and clicking Show.

5.7 CANCELING AND DELETING INTERACTION LOG ENTRIES

Canceling Interaction Log Entries

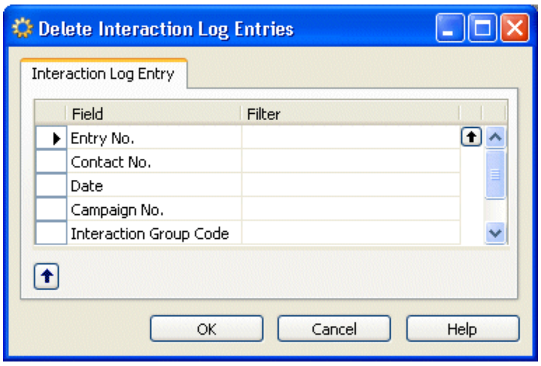
You can cancel interaction log entries, for example, if they record interactions that have not been performed.

To cancel interaction log entries, open the **Interaction Log Entries** window and select the interaction log entry you want to cancel. Click Functions, Switch Checkmark in Canceled. Confirm the subsequent message.

Deleting Interaction Log Entries

Only canceled interaction log entries can be deleted. To delete canceled interaction log entries, follow this procedure:

1 Click Relationship Management, Periodic Activities, Delete, Canceled Interaction Log Entries. The **Delete Interaction Log Entries** window appears.



2 In the **Entry No**. field, click the AssistButton to the right of the **Filter** field and select the interaction log entry that you want to delete.

3 Click OK.

4 In the **Delete Interaction Log Entries** window, click OK.

5.8 INTERACTION STATISTICS

You can view statistics about your interactions in the **Interaction Tmpl. Statistics** window and the **Interaction Group Statistics** window.

Interaction Templates Statistics

In the **Interaction Tmpl. Statistics** window, you can view information about the interaction templates, such as the number of interactions created using the interaction templates, the total cost and total duration of these interactions.

To open the **Interaction Tmpl. Statistics** window, in the **Interaction Templates** window, select the interaction template that you want to view statistics for, and then click Interaction Template, Statistics.

To see the details about the interactions created using the interaction template, in the **Interaction Tmpl. Statistics** window, click the AssistButton to the right of the **No. of Interactions**, **Cost (LCY)** or **Duration (Min.)** fields.

Interaction Group Statistics

In the **Interaction Group Statistics** window you can view information about interaction groups. This window enables you to see statistics for a group of interaction templates. For example, for all the letters, you can see how many interactions were created using interaction templates from this group, and their total cost and duration.

To open the **Interaction Group Statistics** window, in the Interaction Group window, select the interaction group that you want to view statistics for, and then click Interaction Group, Statistics.

To see details about the interactions created using interaction templates from the interaction group, in the **Interaction Group Statistics** window, click the AssistButton to the right of the **No. of Interactions**, **Cost (LCY)** or **Duration (Min.)** field.

5.9 EXERCISES

Exercise 12 **Creating a sales quote and an order for the Interaction Log**

1 Create a letter to Eric Davis from Rent-a-Bike to propose a meeting where you will present your new range of tires and bells to him.

2 Eric is considering purchasing 20 tires and 50 bells. Create a sales quote for Rent-a-Bike.

Additional information: Posting groups for Rent-a-Bike

General business posting group: *EU*

General VAT business posting group: *EU*

General customer posting group: *Domestic*

Tire Item No.: *1160*

Bell Item No.: *1600*

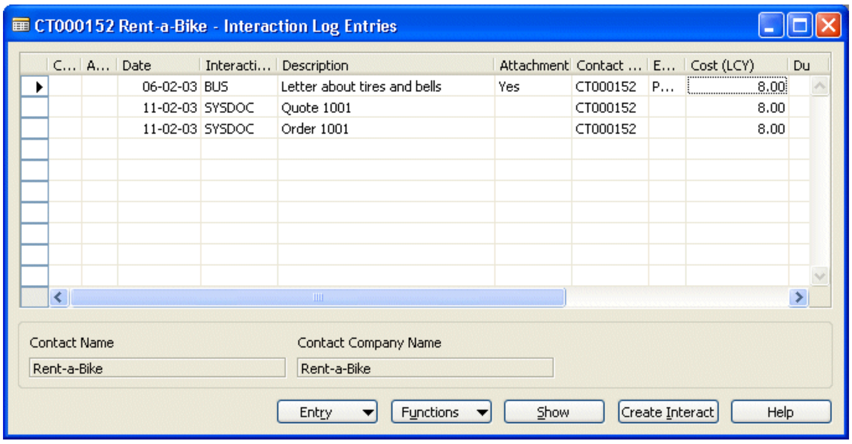
3 Print the sales quote, and check that it has been recorded as an interaction.

4 Finally, Eric decides to purchase 25 tires and 25 bells. Create the sales order and print it.

5 Open the Interaction Log Entries for Rent-a-Bike and check that it contains all the interactions you have recorded.

Solution

When you have completed all the exercises, the **Interaction Log Entries** window for Rent-a-Bike should look like this:


CT000152 Rent-a-Bike - Interaction Log Entries
C... A... Date Interacti... Description Attachment Contact ... E... Cost (LCY) Du
06-02-03 BUS Letter about tires and bells Yes CT000152 P... 8.00
11-02-03 SYSDOC Quote 1001 CT000152 8.00
11-02-03 SYSDOC Order 1001 CT000152 8.00
Contact Name
Rent-a-Bike
Contact Company Name
Rent-a-Bike
Entry
Functions
Show
Create Interact
Help

Chapter 6

Campaigns and Segmentation

This chapter contains the following sections:

- Introduction to Campaigns and Segments
- Setting Up Campaigns
- Creating Campaigns
- Creating Segments
- Creating Interactions for Segments
- Creating Segments by Reusing Logged Segments
- Creating Segments by Reusing Saved Segments
- Campaign Pricing
- Campaign Statistics
- Exercises

6.1 INTRODUCTION TO CAMPAIGNS AND SEGMENTS

In the Relationship Management application area, you can create campaigns and set up segments of your contacts for mailings and other types of interactions. You can use these features to create and keep track of mass mailings and other interactions in connection with your sales and marketing activities.

Campaigns

A campaign can be any sort of activity that involves a number of contacts. It could be anything from sending out catalogs and special offers to organizing a special event (in which case the contacts might be both vendors and customers). You can record contact responses to campaigns as interactions.

There is a statistics window for each campaign that provides information about the costs and success rates of the campaign.

Segments

Segments are groups of contacts that you create using filters. You can create segments for use with campaigns, or for other purposes. You use segments to create interactions, such as mailings, and to view statistics about your sales and marketing activities for that segment of your contacts.

If the interaction is a fax or an e-mail, you can have the program automatically send these to the contacts in the segment. If the interaction is a letter, you can have the program print the letters and mailing labels for the letters. Whichever type of interaction you choose, it is registered as an interaction for the contact.

Once you have created a segment, you can reuse the actual group of contacts or you can reuse the segment criteria to create a new segment based on the same criteria.

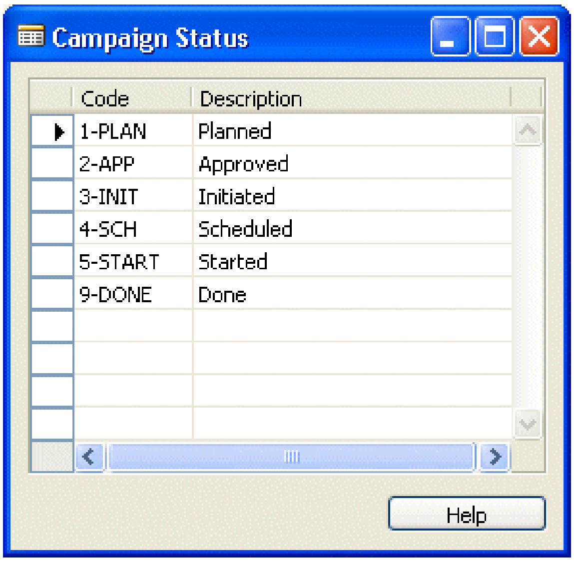
6.2 SETTING UP CAMPAIGNS

Before you can use your campaigns, you must set up campaign status codes. You can use these codes to manage your campaigns by assigning a status to the campaign. As you work through the stages of the campaign, you and other users of the program can quickly see which step a campaign is at and which step is coming next.

Setting Up Campaign Status Codes

To set up campaign status codes, follow this procedure:

1 Click Relationship Management, Setup, Campaign, Campaign Status. The **Campaign Status** window appears:



2 Click F3 to add a new line.

3 In the **Code** field, enter a code for the campaign status.

4 In the **Description** field, enter a description of the campaign status.

5 Repeat the procedure for each campaign status you want to set up.

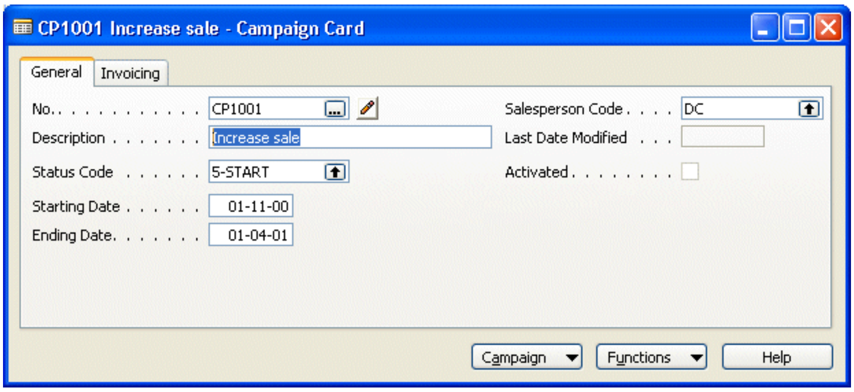
6.3 CREATING CAMPAIGNS

You can view general information about your campaigns on the campaign card. You create a campaign card for each campaign that you want to keep track of.

Creating Campaigns

To record a new campaign in the program, follow this procedure:

1 Click Relationship Management, Campaigns. The campaign card appears:

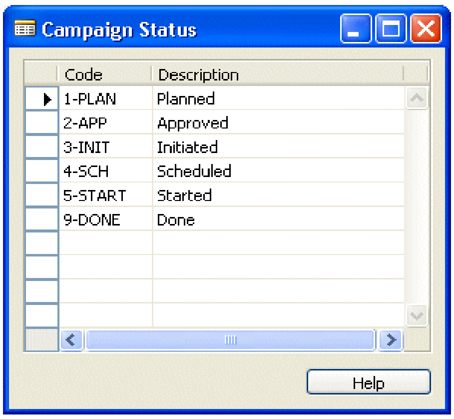


2 Press F3 to create a new campaign.

3 In the **No.** field, press Enter. The program automatically enters the next available number in the number series for campaigns.

4 In the **Description** field, enter a description of the campaign.

5 Click the AssistButton to the right of the **Status Code** field. The **Campaign Status** window appears.



6 Select the appropriate status code and click OK.

7 In the **Stating Date** field, enter today's date.

8 In the **Salesperson Code** field, enter the responsible salesperson.

Creating Interactions Linked to Campaigns

After you have created a campaign, you can record interactions for that campaign. You can create interactions involving a contact and that are linked to the campaign using the **Create Interaction** wizard. For information on using this wizard, see chapter 5, "Using the Create Interaction Wizard."

Entering Campaign Information in the Create Interaction Wizard

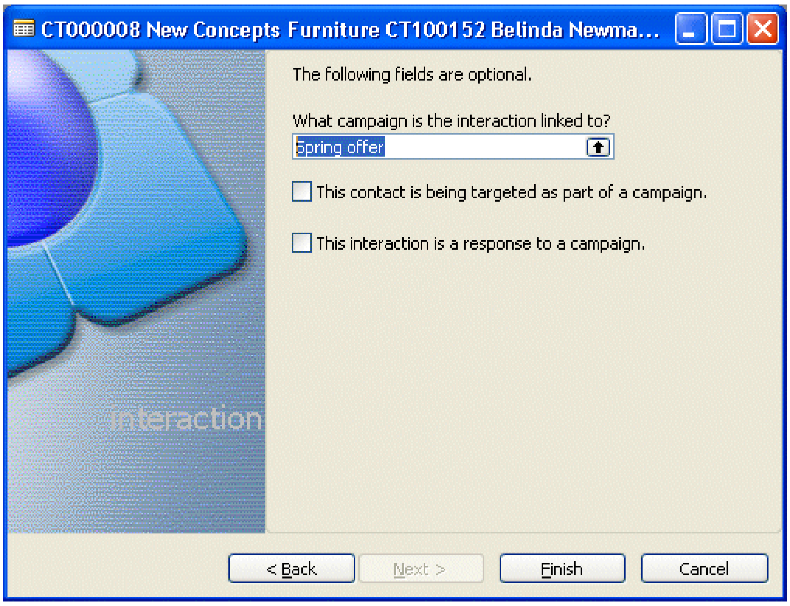
You can enter information about the campaign that an interaction is linked to on the last page of the wizard. You can select which campaign the interaction is linked to, specify if the contact is a target contact for the campaign, and specify if the interaction records the response to the selected campaign.

To enter information about the campaign, follow this procedure:

1 On the contact card, click Create Interact, the **Create Interaction** wizard appears.

2 Fill in the mandatory and any relevant optional fields of the wizard. On the last page of the wizard, click the AssistButton to the right of the **Campaign No.** field.

3 Select the campaign that the interaction is linked to and click OK.



If the contact is part of the target group for the campaign, place a check mark in the **Campaign Target** field.

4 If the interaction is a response to the campaign, place a check mark in the **Campaign Response** field.

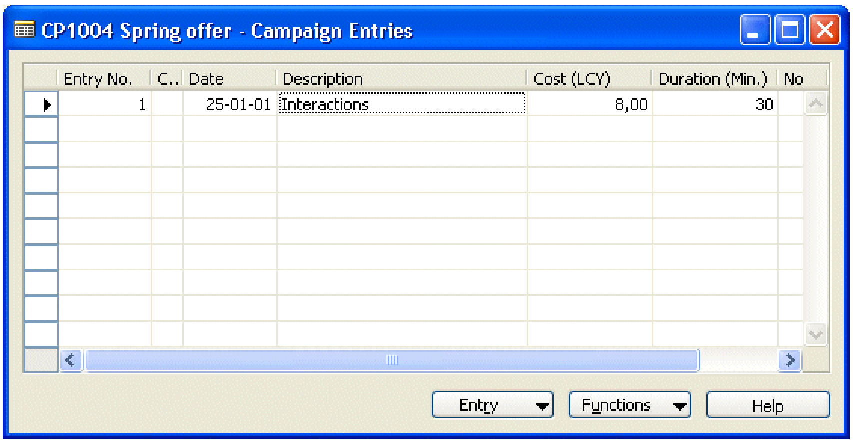
5 Click Finish.

When you click Finish, the program automatically updates the **Interaction Log Entries** window for the contact, and enters a new entry in the **Campaign Entries** window for the relevant campaign.

Viewing the Interaction in the Campaign Entries Window

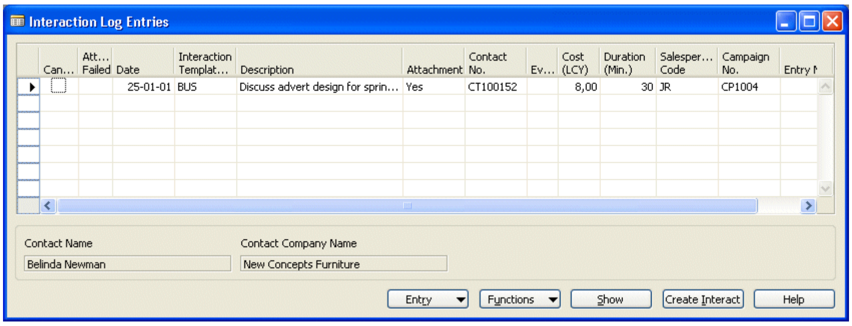
You can see this interaction in the **Campaign Entries** window for the relevant campaign.

To open the **Campaign Entries** window, click Relationship Management, Campaigns. Find the campaign card for the campaign and click Campaign, Entries. The **Campaign Entries** window appears.



To see the interaction log entry linked to the campaign entry, select the campaign entry and then click Entry, Interaction Log Entries.

The **Interaction Log Entries** window appears.



Changing the Status of the Campaign

Once your campaign is under way, you must modify the status of the campaign, you can do this directly on the campaign card.

To modify the status of the campaign, follow this procedure:

1 Click Relationship Management, Campaigns.

2 On the campaign card, click the AssistButton to the right of the **Status Code** field.

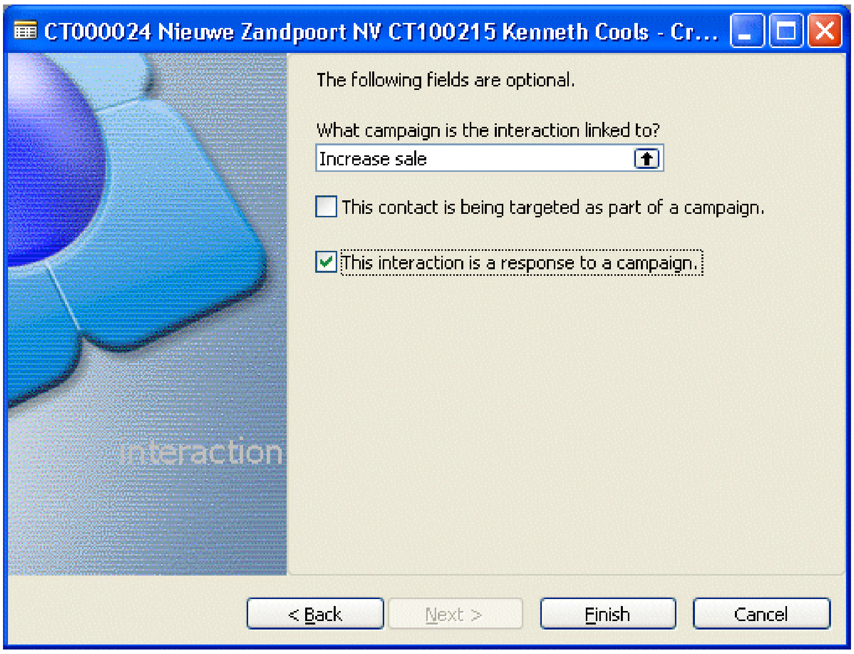
3 In the **Campaign Status** window, select the appropriate option, and click OK.

Example **Creating an Interaction Linked to a Campaign**

As part of the Increase Sales campaign, you are planning to hold a press conference at the Hotel Continental to present a new product. You have an initial meeting at the hotel that goes well and you book their conference room.

Record this meeting as an interaction linked to the Increase Sales campaign.

When you have created the interaction, the last window of the **Create Interaction** wizard will look like this:



6.4 CREATING SEGMENTS

You can create segments, for example if you want to select a group of contacts according to specific criteria, such as the industry the contacts belong to, your business relation with the contact, the interactions you have had with the contact, and so on.

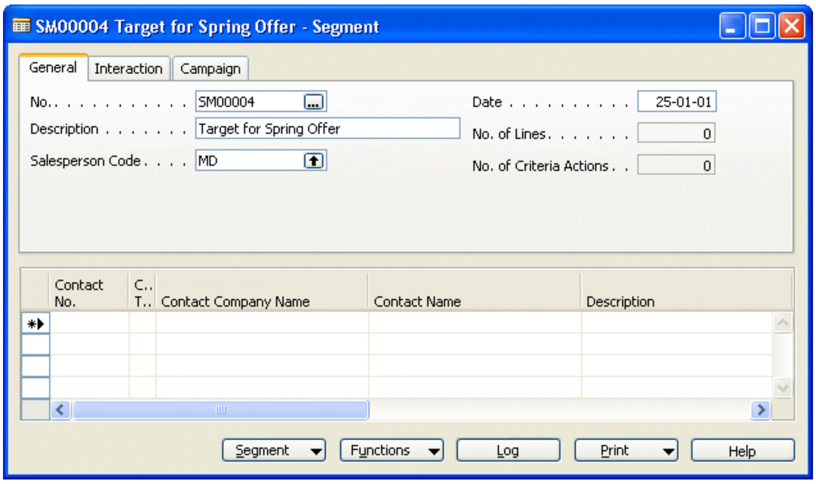
You can, for example, create a segment to select the contacts you want to target with a campaign.

There are two steps in creating a segment in the program: entering general information about the segment, and selecting the contacts to be included within the segment.

Entering General Information

Before you can select the contacts within the segment, you must create the segment in the program. To do this, follow this procedure:

1. Click Relationship Management, Segments. The **Segment** window appears.



2. Press F3 to create a new segment.

3. In the **No**. field, press Enter to have the program automatically enter the next available segment number.

4. In the **Description** field, enter a description of the segment.

5. In the **Salesperson Code** field, enter the responsible salesperson.

Selecting Contacts for the Segment

After entering general information about the segment, you must select the contacts to be included in the segment. You can use a variety of criteria to select contacts. For example, you can select contact persons working at a customer site or prospective customer site who are responsible for purchases at their company.

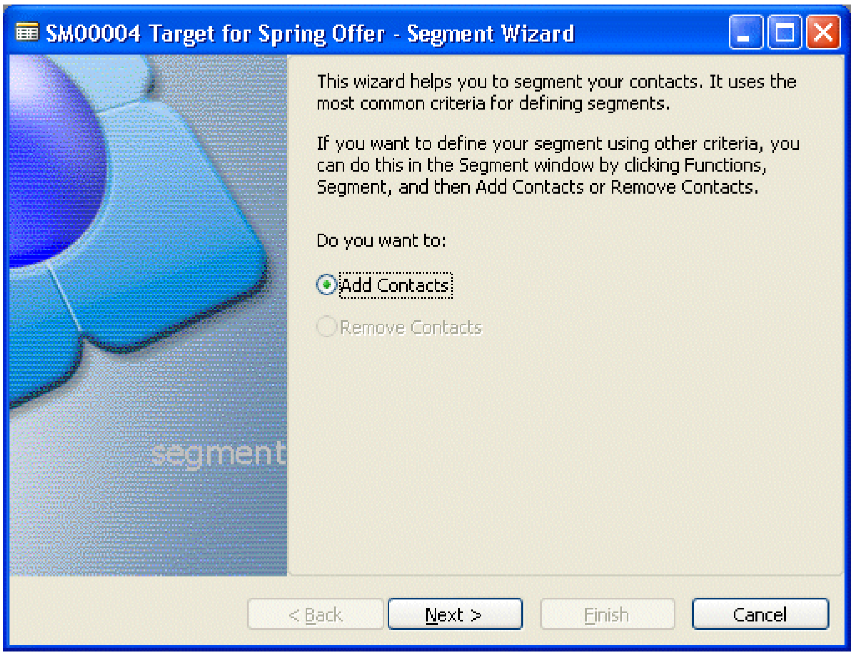
You use filters to add contacts according to, for example, the job responsibility of the contact person or the business relation or industry of the contact company. Once you have added contacts, you can then remove contacts using other filters, such as mailing groups or another filter not used previously.

Example

Adding Contacts to the Segment

To select the contact persons who, for example, have the business relation *Customer* and are responsible for purchases, follow this procedure:

1 In the **Segment** window, click Functions, Segment, Wizard. The **Segment Wizard** appears.



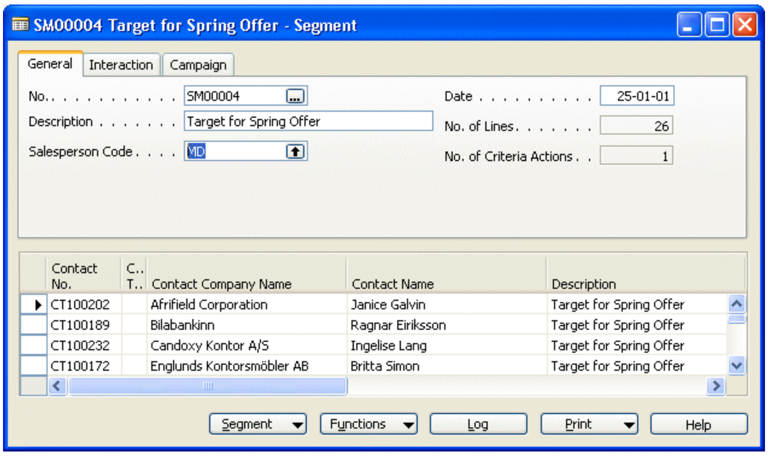
2 Select the option **Add Contacts** and click Next. The second page of the wizard appears:

3 Click the AssistButton to the right of the relevant criteria, in this example the **Business Relation** field, select *Customer*, and click OK.

4 Click the AssistButton to the right of the **Job Responsibilities** field. Select the job responsibility *Purchase*, and click OK.

5 Click Finish.

The **Segment** window now looks like this:



In the **No. of Lines** field, the program has automatically entered the number of contacts selected according to your criteria.

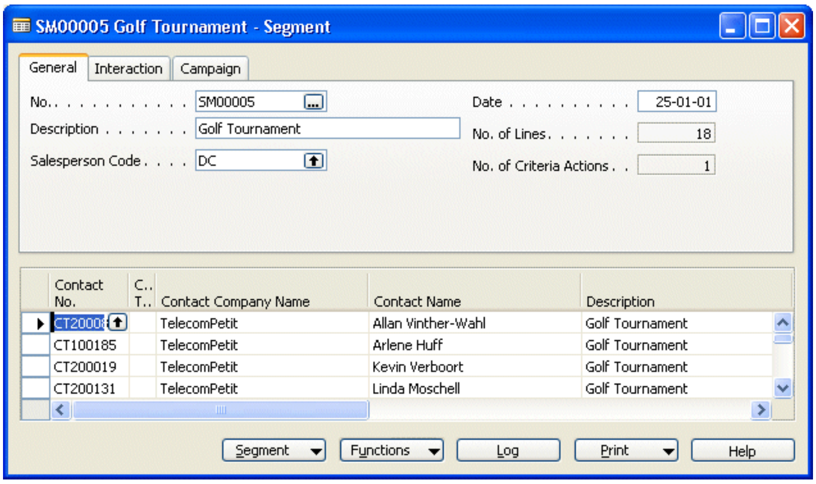
Exercise 13 Creating a Segment

This year at Cronus, you have decided to sponsor the biggest national golf tournament and would like to invite some of your contacts to attend this event.

Create a segment with contacts that are members of the press.

Solution

When you have created the segment, the **Segment** window should look like this:



Removing Contacts from the Segment

Once you have added contacts to your segment, you can also remove contacts using other criteria. For example, you could remove all contacts in a specific mailing group or those on a certain organizational level. If you made a mistake and want to remove an entire group that you added previously, then you can use the same criteria to remove the contacts as when you added them to the segment.

To remove contacts from a segment, follow this procedure:

1 In the **Segment** window, click Functions, Segment, Wizard.

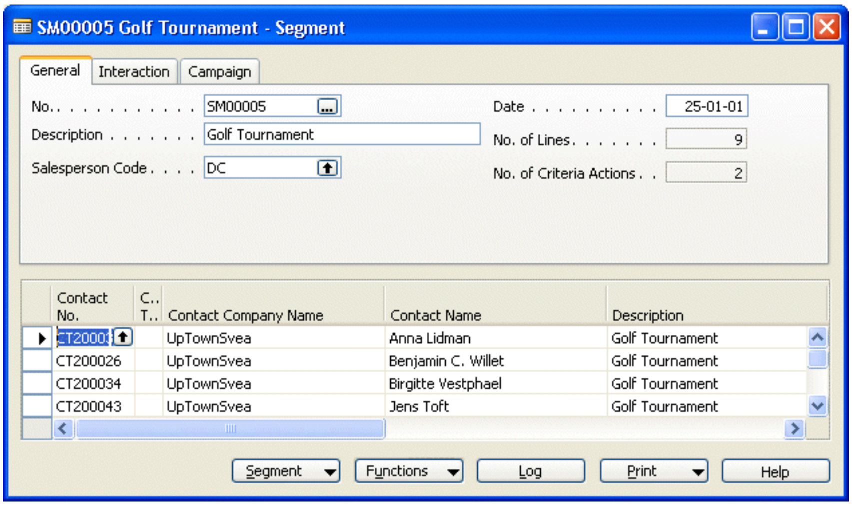
2 On the first page of the wizard, select the option **Remove Contacts** and click Next.

3 On the second page of the wizard, select **Reduce your segment** and click Next.

4 On the next pages of the wizard, click the AssistButton to the right of the criteria you want to use, for example the **Country** field. Select the relevant country and click OK.

5 Click Finish.

After you have reduced your segment by excluding for example contacts from GB, your Segment window could look like this:



The Go Back Function

If for some reason you need to reverse the addition or removal of a group of contacts from a segment, you can do this with the Go Back function. The program allows you to undo your segmentation actions.

To add contacts you have just removed, go to the **Segment** window and click Functions, Segment, Go Back.

The program automatically replaces the contacts that you have removed.

Saving Segmentation Criteria

You can save your segmentation criteria so that you can reuse the segment for other campaigns and interactions.

To save the segmentation criteria that you have defined, follow this procedure:

1 In the **Segment** window, click Functions, Segment, Save Criteria. The **Save Segment Criteria** window appears.

2 In the **Code** field, enter a code for the segment criteria.

3 In the **Description** field, enter a description of the segment criteria.

4 Click OK.

Linking Segments to Campaigns

You can link segments to specific campaigns. To do this, follow this procedure:

1 In the **Segment** window, on the **Campaign** tab, click the AssistButton to the right of the **Campaign No.** field. Select the relevant campaign, and click OK.

2 If the segment is the target of the campaign, click to insert a check mark in the **Campaign Target** field.

6.5 CREATING INTERACTIONS FOR SEGMENTS

You can create interactions for all the contacts within a segment. You can do this directly from the **Segment** window. In the **Segment** window, on the **Interaction** tab, you can specify interaction-related information. You can, for example, select an interaction template and an attachment that will be applied to all the contacts within the segment.

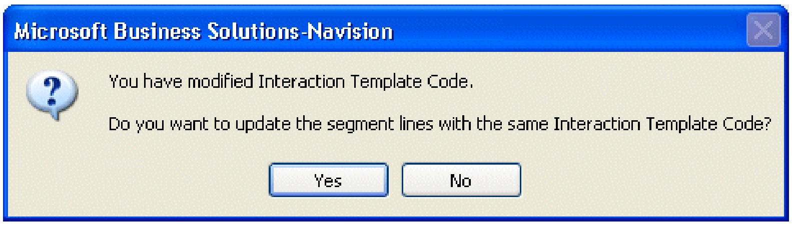
Entering Interaction Information for a Segment

To enter information related to an interaction for a segment, follow this procedure:

1 In the **Segment** window, click the **Interaction** tab.

2 Click the AssistButton to the right of the **Interaction Template Code** field. Select the relevant interaction template and click OK.

When you leave the **Interaction Template Code** field, the following message appears:

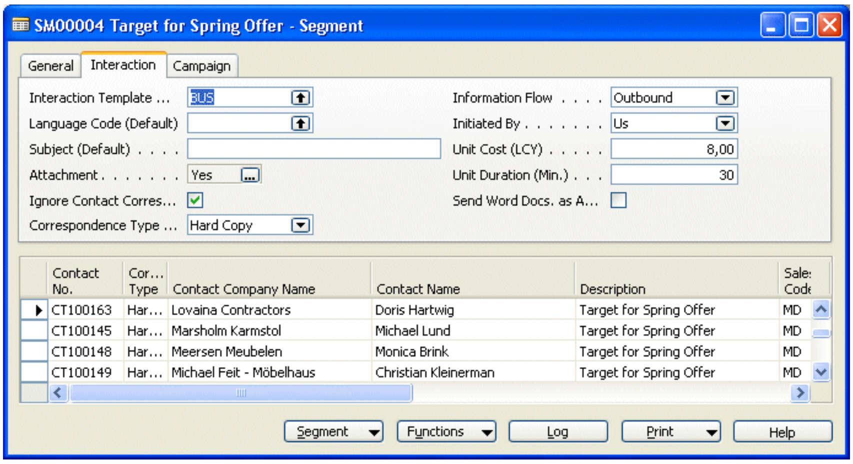


3 Because you want to send the attachment to all the contacts, click Yes.

The program automatically applies the interaction template to all the contacts within the segment.

The program uses the information defined for the interaction template in the **Interaction Template** window to fill in the different fields on the **Campaign** tab.

The **Interaction** tab looks like this:

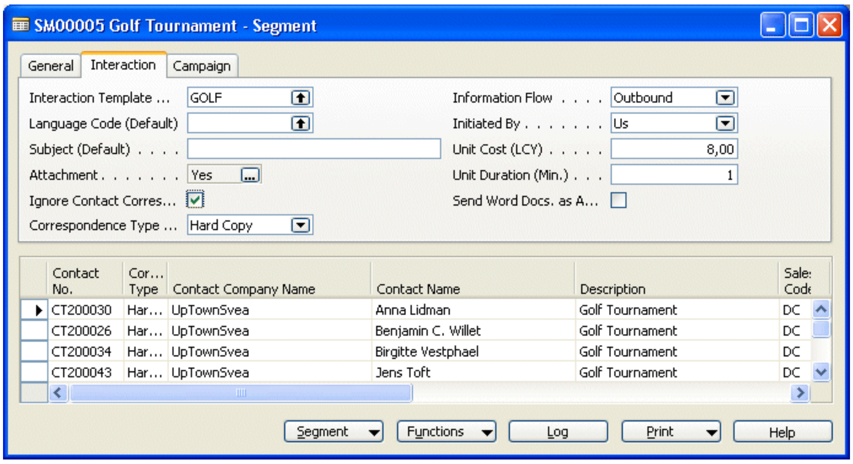


Exercise 14 Sending a Letter to a Segment

Send a letter to the segment you created earlier, using the Business Letter interaction template.

Solution

When you have created the interaction for the segment, the **Interaction** tab for the segment should look like this:



Personalizing an Interaction for One Contact

You can personalize an interaction for one contact in a segment, for example, by adding a sentence to a letter.

To do this, follow this procedure:

1 In the **Segment** window, find the line with the relevant contact.

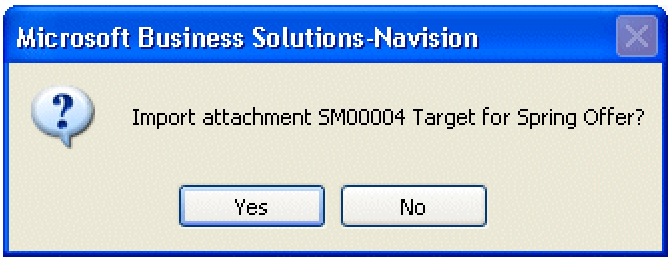
2 On this line, in the **Attachment** field, click the AssitButton.

The program launches Microsoft Word and opens the letter for the contact.

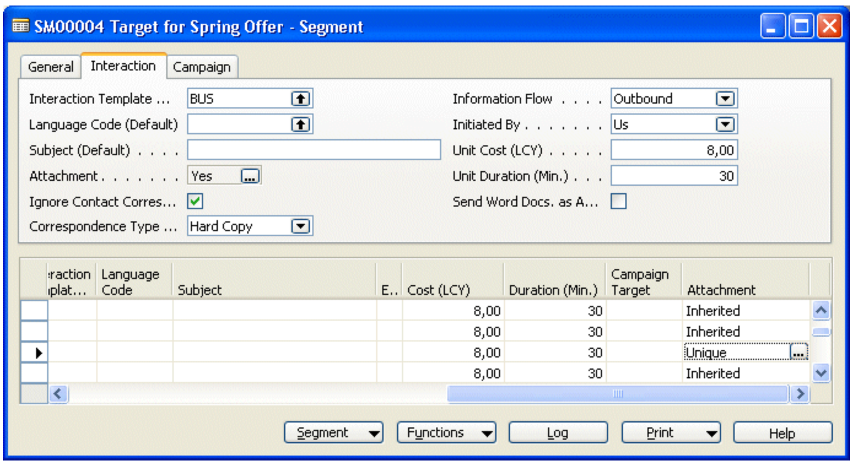
3 Add the personalized text to the letter.

4 Close the Microsoft Word document.

5 Confirm the subsequent message.



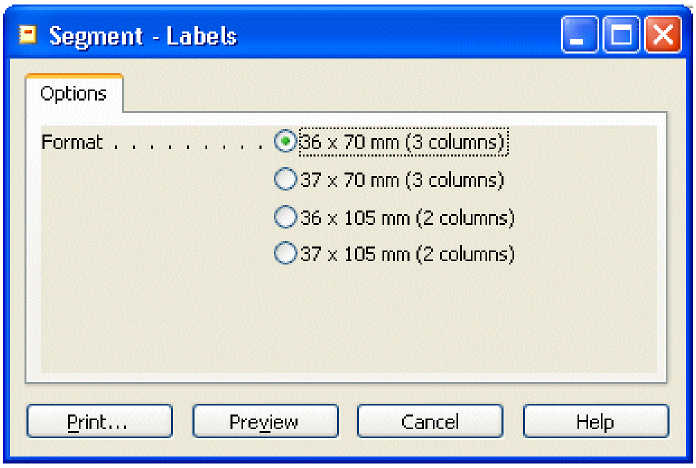
The program automatically enters *Unique* in the **Attachment** field, to show that the attachment is personalized.



Printing Segment Labels

In order to send letters, you can print labels with the names and addresses of the contacts within the segment. To do this, follow this procedure:

1 In the **Segment** window, click Print, Labels. The **Segment - Labels** window appears.



2 The program automatically selects the option **30 x 70 mm (3 columns)**. Select other dimensions if necessary.

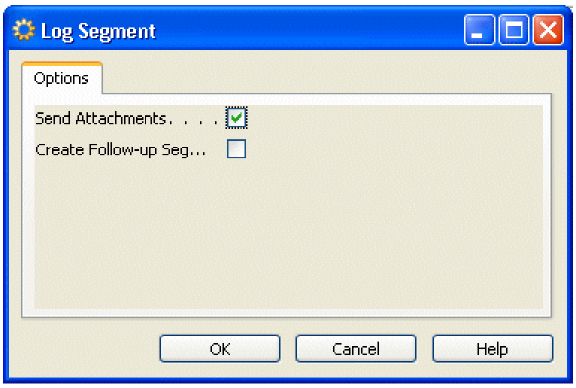
3 Click Print.

4 In the **Segment - Labels - Print** window, check the printer settings and click OK.

Printing Letters

You can print letters created as interactions and have them recorded in the program. Follow this procedure:

1 In the **Segment** window, click Log. The **Log Segment** window appears.



The program enters a check mark in the **Send Attachments** field by default.

2 As you want the program to print the letters, leave the check mark in the **Send Attachments** field.

3 Click OK.

The program automatically prints the letters, and logs the segment. Because the segment has been logged, you won't be able to find it in the **Segment** window any longer.

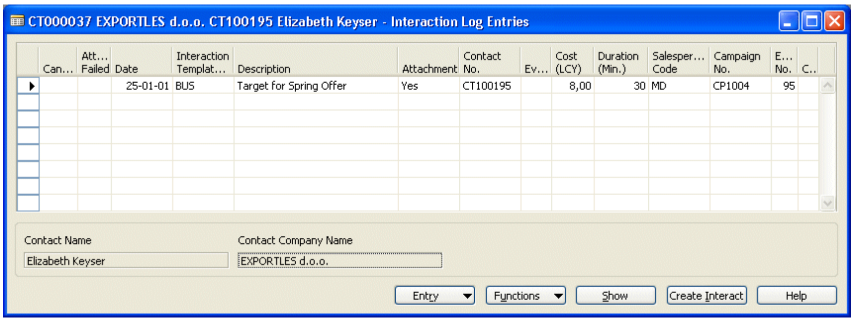
The program has automatically recorded an interaction for each of the contacts within the segment, and has created an entry for the campaign.

Viewing Interaction Log Entries Linked to the Segment

You may need to view an interaction (such as a fax or a letter) that has been sent, for example if the contact calls you about the interaction and you do not remember the details. To view the interaction again, follow this procedure:

1 Click Relationship Management, Contacts.

2 Find the contact card for the contact, and click Contacts, Interaction Log Entries. The **Interaction Log Entries** window for the contact appears.



3 On the line with the relevant interaction, click the AssistButton to the right of the **Attachment** field.

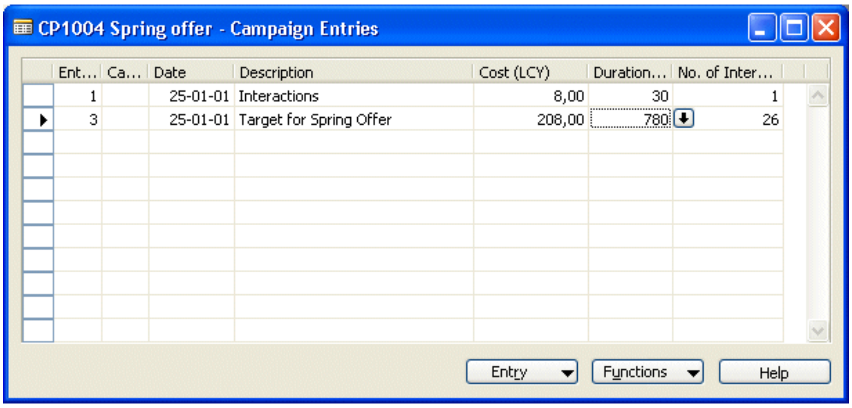
The program automatically launches Microsoft Word and opens the interaction.

Viewing Campaign Entries Linked to the Segment

When you logged the segment, the program automatically created a campaign entry for the campaign. You can view this in the **Campaign**

Entries window for the campaign.

Click Relationship Management, Campaigns. Find the campaign card for the campaign, and click Campaign, Entries. The **Campaign Entries** window appears:



You can see the cost of the interaction and how many contacts you sent it to.

6.6 Creating Segments by Reusing Logged Segments

You can save time by creating segments from segments that have already been logged, instead of starting from the beginning. For example, you might want to create a segment similar to an existing segment, except for certain contacts. To create a segment by reusing a logged segment, follow this procedure:

1 Click Relationship Management, Segments.

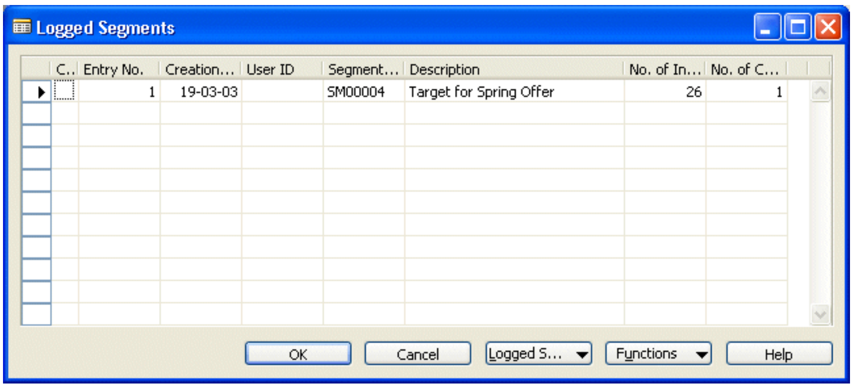
2 In the **Segment** window, place the cursor in one of the fields in the header, and press F3.

3 In the **No.** field, press Enter to have the program automatically enter the next available segment number.

4 In the **Description** field, enter a description of the new segment.

5 In the **Salesperson Code** field, enter the desired salesperson code.

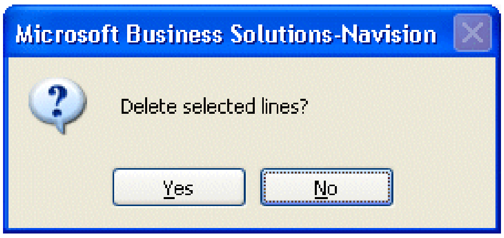
6 Click Functions, Segment, Reuse, Logged Segment. The **Logged Segments** window appears.



7 Select the line with the relevant logged segment, and click OK.

The program automatically fills in the lines of the **Segment** window with the contacts contained in the logged segment.

Now, you can manually remove any contacts that you do not want included in the new segment. To remove a contact, in the **Segment** window, select the line with the contact to be deleted and press F4. Then confirm the subsequent message.



Repeat this procedure to remove any other unwanted contacts from the segment.

In the **No.** of Lines field, you can see the new number of contacts in the segment.

Recording Interactions

You can record interactions for an entire segment. If you are conducting a sales campaign, for example, and a large number of contacts have responded to your initial interaction, it is practical to set up a segment for the contacts that have responded, and then create their responses as interactions all at once, instead of creating an interaction for each contact individually.

Follow this procedure:

1 In the **Segment** window, click the **Interaction** tab.

2 In the **Interaction Template Code** field, click the AssistButton.

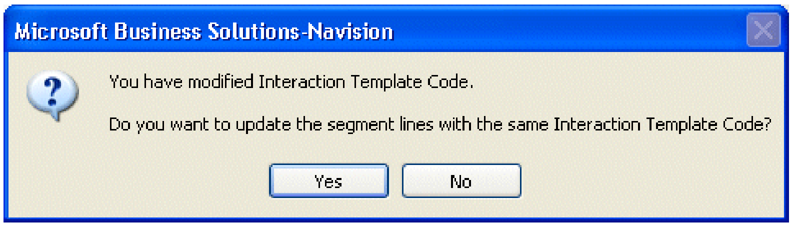
There is no interaction template for recording responses to campaigns. You can create one:

3 In the **Interaction Templates** window, press F3.

4 In the **Code** field, enter *RESP*, and in the **Description** field, enter *Campaign Responses*.

5 Click OK.

6 Select the appropriate interaction template in the **Interaction Template Code** field. The following message appears:



7 Confirm this message.

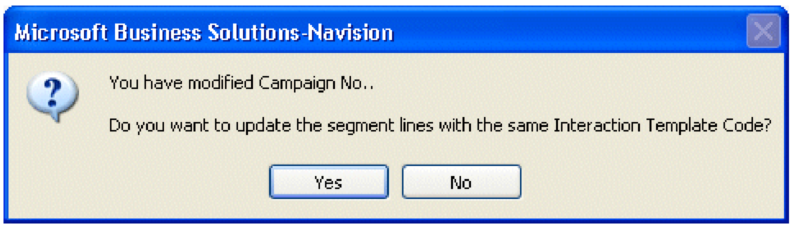
Entering Campaign Responses

To specify that these contacts have responded to the campaign, follow this procedure:

1 On the **Campaign** tab, in the **Campaign No.** field, click the AssistButton.

2 Select the appropriate campaign, and click OK.

3 Leave the **Campaign No.** field and confirm the subsequent message.



4 In the **Campaign Response** field, insert a check mark, and confirm the subsequent message.

Logging the Segment

To log the segment and record the interactions, follow this procedure:

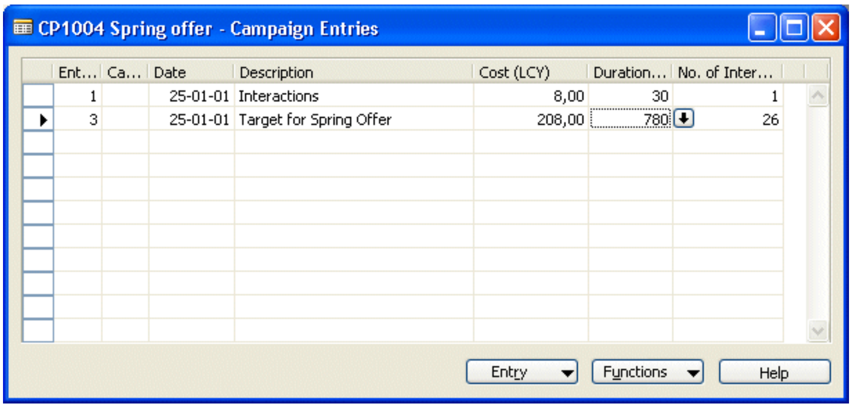
1 Click Log.

2 In the **Log Segment** window, click OK.

3 Confirm the subsequent message.

Viewing Campaign Information

When you log the segment, the program automatically creates an entry for the campaign to record this action. You can view it in the **Campaign Entries** window for the campaign.



6.7 CREATING SEGMENTS BY REUSING SAVED SEGMENT CRITERIA

You can use saved segmentation criteria to create new segments. Follow this procedure:

1. Click Relationship Management, Segments.
2. Place the cursor in the header of the **Segment** window, and press F3.
3. In the **No**. field, press Enter to have the program automatically enter the next available segment number.
4. In the **Description** field, enter a description of your new segment.
5. In the **Salesperson Code** field, enter the relevant salesperson code.
6. Click Functions, Segment, Reuse, Saved Criteria. The **Saved Segment Criteria List** window appears.

7. Select the desired saved segment criteria, and click OK.

The program automatically fills in the lines of the **Segment** window with all the contacts currently fulfilling the defined criteria.

6.8 CAMPAIGN PRICING

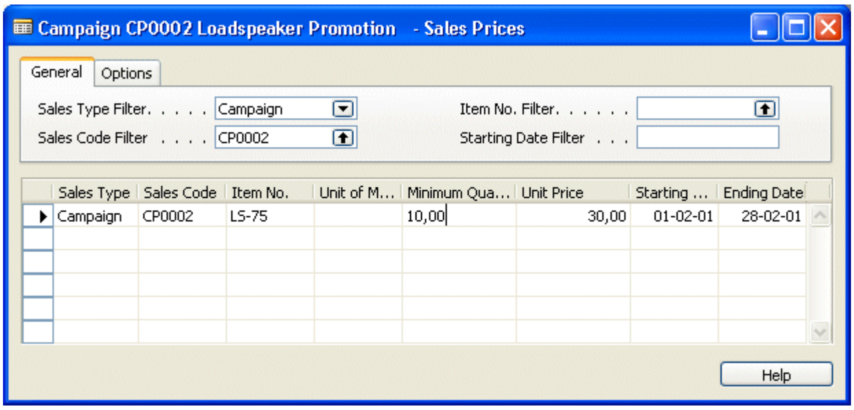
Companies operating in price-sensitive markets with diverse customer bases often need to set up promotional campaigns offering items at special prices for targeted segments of the market. The campaign pricing functionality greatly facilitates this process. It offers two different ways of setting up a promotional price campaign: Using fixed sales prices (see Creating Sales Prices for a Campaign below) and using discount percentages (see Creating Sales Line Discounts for a Campaign below).

Creating Sales Prices for a Campaign

When you have set up your campaign, decided what segments you want the campaign to cover and set the Starting Date and Ending Date for the campaign, you register the sales prices for the individual items on the lines in the **Sales Prices** window.

To create sales prices for a campaign, follow this procedure:

1 Click Relationship Management, Campaigns, browse to the relevant campaign and then click Campaign, Sales Prices. The **Sales Prices** window appears.



2 The **Sales Type Filter** field will be filled in with Campaign, and the **Sales Code Filter** field will contain the campaign number. As the campaign will cover the period defined on the campaign card for all items with sales prices, you cannot change the starting and ending dates on the individual lines. The program transfers the values from the starting and ending date fields on the campaign card to the lines in the **Sales Prices** window.

3 Fill in the fields on the lines with the Item No., Unit of Measure and the

Unit Price to be campaigned. You can also show the Variant Code column and specify the Variant Code if there are several variants of the item.

4 If the customer has to purchase a minimum quantity in order to obtain the campaign price, fill in the **Minimum Quantity** field.

5 Using the Show Column facility, you can also specify the Currency Code and indicate whether line discount and invoice discount should be allowed.

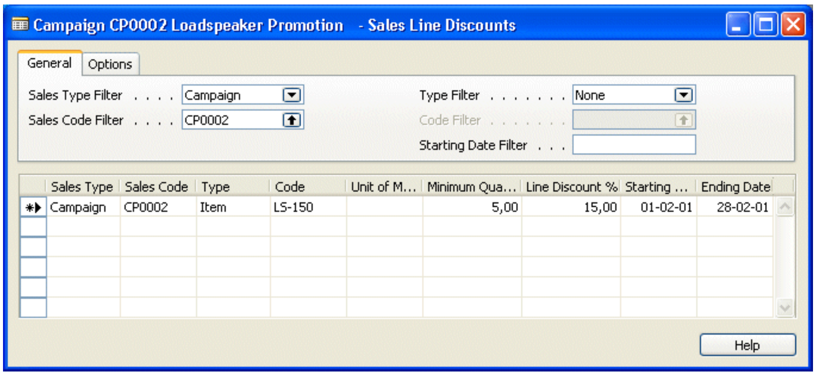
Repeat steps 3-5 for every item for which you want to create a Sales Price.

Creating Sales Line Discounts for a Campaign

When you have set up your campaign, decided what segments you want the campaign to cover and set the Starting and Ending Date, you register the discount % that the customer will receive on the individual items on the lines in the **Sales Line Discounts** window.

To create sales line discounts for a campaign, follow this procedure:

1 Click Relationship Management, Campaigns, browse to the relevant campaign and then click Campaign, Sales Line Discounts. The **Sales Line Discounts** window appears.



2 The **Sales Type Filter** field will be filled in with Campaign, and the **Sales Code Filter** field will contain the campaign number. As the campaign will cover the period defined on the campaign card for all items with sales prices, you cannot change the starting and ending dates on the individual lines. The program transfers the values from the starting and ending date fields on the campaign card to the lines in the **Sales Prices** window.

3 Fill in the fields on the lines with the Item Type (item or item discount group), Item Code (this can be either the item number or the item discount group code), Unit of Measure and the Line Discount %. You can also show the Variant Code column and specify the Variant Code if there are several variants of the item.

4 If the customer needs to purchase a minimum quantity in order to obtain the campaign discount %, fill in the **Minimum Quantity** field.

5 Using the Show Column facility, you can also specify the Currency Code.

Repeat steps 3-5 for every item for which you want to create a Sales Line Discount.

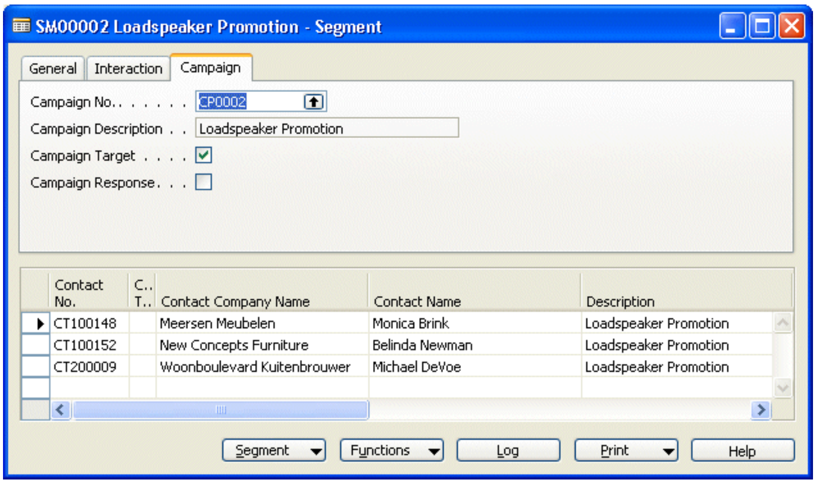
Activating/Deactivating Sales Prices and Line Discounts in a Campaign

When you have set up the sales prices and/or line discounts and specified the segments on the campaign card, you must activate them to allow the campaign prices/discounts to be reflected on the lines.

To activate sales prices/line discounts in a campaign, follow this procedure:

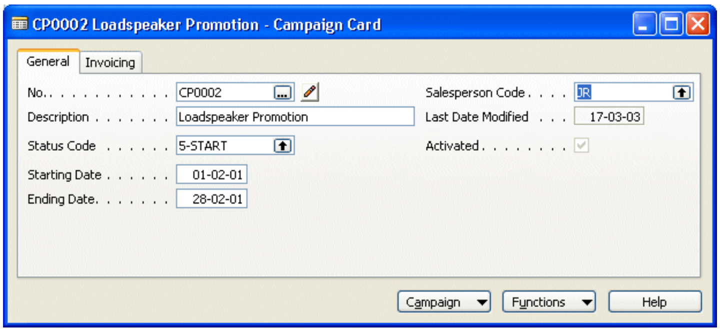
1 Click Relationship Management, Campaigns, browse to the relevant campaign and then click Campaign, Segments.

2 On the **Campaign** tab, place a check mark in the **Campaign Target** field.



3 Close the **Segment** window.

4 On the campaign card, click Functions, Activate Sales Prices/Line Discounts. A check mark appears in the **Activated** field.



Note

In order to activate the sales prices/line discounts, the **Campaign Target** field on the Segment card must contain a check mark. If the sales prices/line discounts covers all the contacts in the segment, place a check mark in the **Campaign Target** field on the **Campaign** tab of the Segment card. If the sales prices/line discounts are not to be offered to all the contacts in the segment, you can remove the check mark from the **Campaign Target** field for the lines in question.

If, for example, you want a campaign to stop before the ending date you specified when you set up the campaign, you can deactivate the sales prices/line discounts for that campaign.

To deactivate sales prices/linie discounts, follow this procedure:

1 Click Relationship Management, Campaigns and browse to the relevant campaign.

2 Click Functions, Deactivate Sales Prices/Line Discounts.

The sales prices/line discounts are deactivated and the check mark disappears from the **Activated** field.

Note

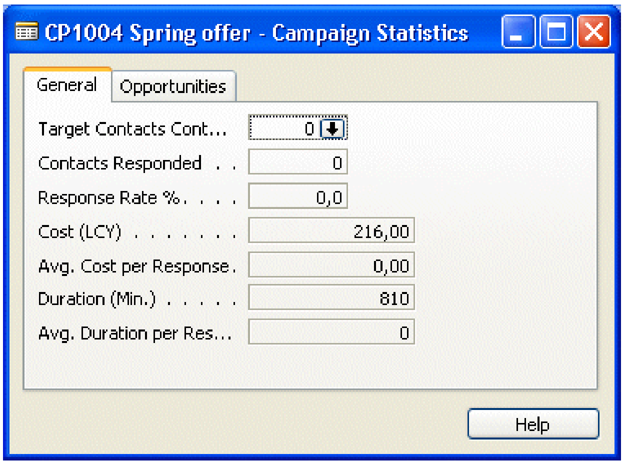
If you remove the check mark in the **Campaign Target** field on either the segment card or the segment line, the sales prices and line discounts will be deactivated for either the segment or the segment line.

6.9 CAMPAIGN STATISTICS

You can get a precise overview of how a campaign is going. You can view this information in the **Campaign Statistics** window.

To open the **Campaign Statistics** window, on the campaign card, click Campaign, Statistics, or press F9.

The **Campaign Statistics** window looks like this:



In the **Response Rate %** field, you can see the percentage of contacts contacted by the campaign who have responded to it.

In the **Avg. Cost per Response** field, you can see how much you have spent on each response that you have received.

In the **Avg. Duration per Response** field, you can see how long time you have spent on each response that you have received.

6.10 EXERCISES

Exercise 15 **Planning a Campaign**

You are going to start a new national campaign to promote your new Millennium office furniture series. You need to plan the campaign, decide which contacts to target with the campaign and save the segmentation criteria that you use so that you can apply them again next year.

1 Record the new campaign in the program and call it *Promoting Millennium Series*.

After a few weeks, you publish an advertisement, and the campaign is actually started.

2 Modify the status of the campaign directly on the campaign card.

In order to promote the new Millennium office furniture series, you have planned another action that consists of sending a mailing to a specific group of contacts. The mailing will consist of a letter introducing the office furniture series.

3 Create a segment (called *Target for Millennium Campaign*) made up of contacts with the following characteristics:

- *Include contact persons who are prospective customers and responsible for purchases at their company.*

- *Do not include contact persons who received the Christmas card because they have already received the letter, so you don't want to include them in the segment.*

4 Save the segmentation criteria that you have used to select this segment, so that you can apply the criteria next year to your database. Link this segment with the campaign you have created for the promotion of the Millennium office furniture series.

5 Set up the letter that you would like to send to all the contacts within the segment. You can do this directly from the **Segment** window. You have already created the letter that you want to send to your contacts. You have inserted it as an attachment for the CANVAS interaction template.

6 Personalize the letter to Amy E. Alberts from EXPORTLES d.o.o., one of the contacts within the segment, by adding the following sentence

at the beginning of the letter "It was a pleasure meeting you at the trade show last week."

7 Print labels with the names and addresses of the contacts within the segment.

8 It is now time to send the letters for the campaign. Print them and record them as interactions in the program.

Exercise 16 **Recording responses**

Now you need to create another segment to record the contacts that have responded positively to the Millennium office furniture campaign. You can create this new segment using the segment that you have already logged.

1 Create a new segment containing the same contacts as the first segment, except for one contact (Shelley Dick) who has not responded to the campaign. Create the segment using the segment that you have already logged.

2 Record as an interaction that the contacts in this new segment have positively responded to the campaign by asking for more information.

3 Log the segment and record the interactions.

Exercise 17 **Using Saved Segmentation Criteria**

A year has passed and you have got a new office furniture series to promote, the Futurus series. The campaign you made last year was a great success, and you would like to target the same category of contacts. As you have added several prospective customers to your database since last year, you cannot use the logged segment to create the new segment. But, last year you saved the segmentation criteria that you used for the first segment.

1 Create a new campaign called *Target for Futurus Campaign*.

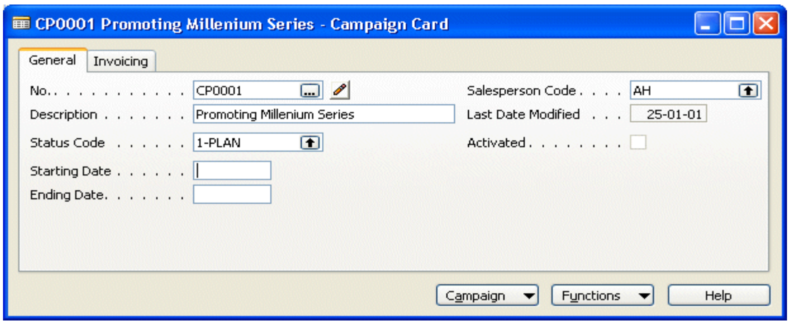
2 Create a new segment called *Target for Futurus Campaign*.

3 Use the saved segmentation criteria to select the contacts to target for the new campaign.

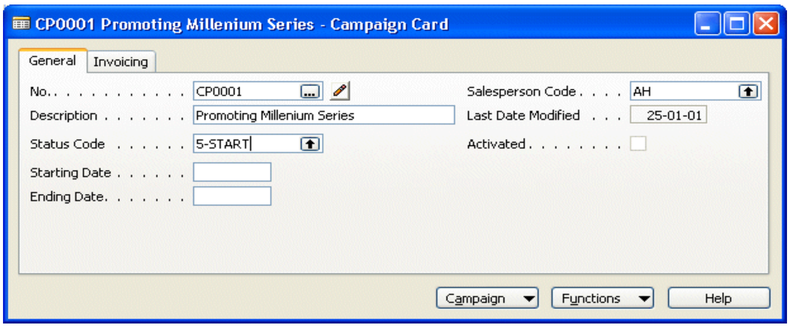
Solutions

Exercise 15

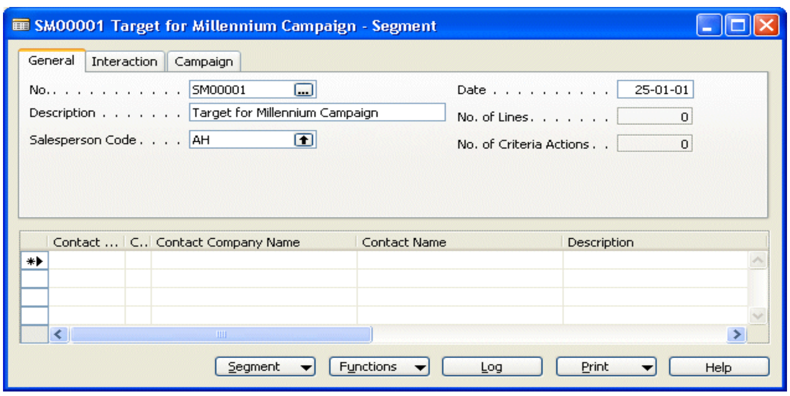
1 When you have recorded the new campaign to promote the Millennium office furniture in the program, the campaign card should look like this:



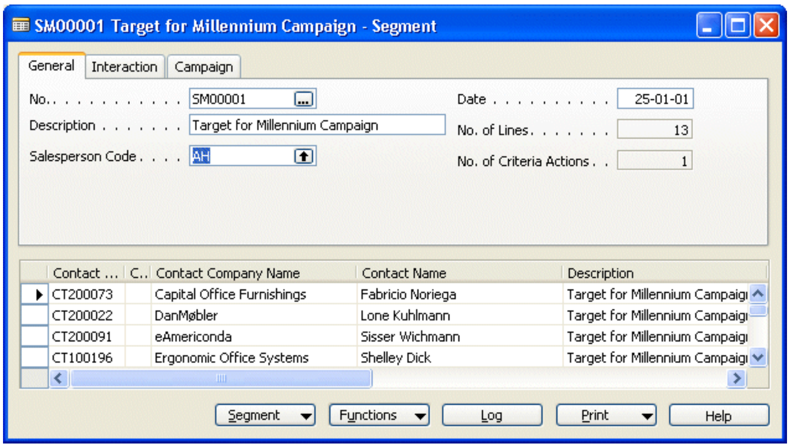
2 When you have modified the status of the campaign, the campaign card should look like this:



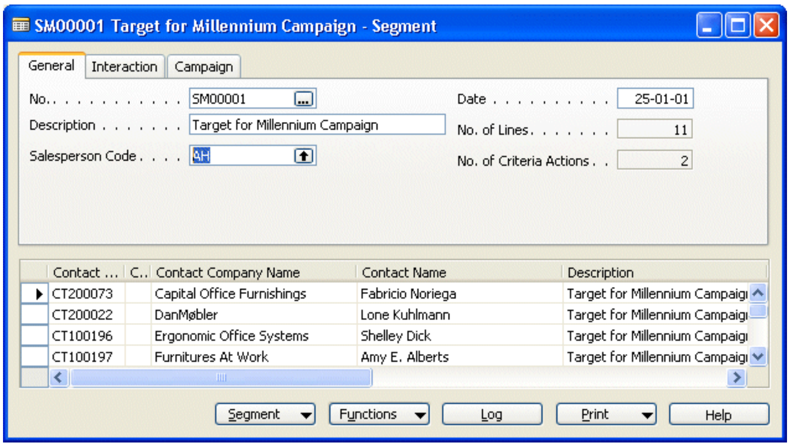
3 When you have set up the segment, the **Segment** window should look like this:



When you have selected the contact persons who are prospective customers and responsible for purchases, the **Segment** window should look like this:

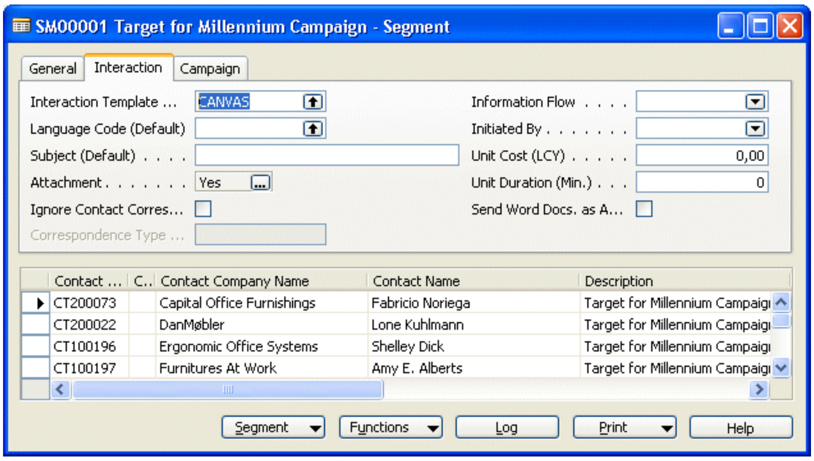


When you have removed all the contacts that belong to the Christmas card mailing group there should be fewer contacts in the **No. of Lines** field, as shown in the following picture:



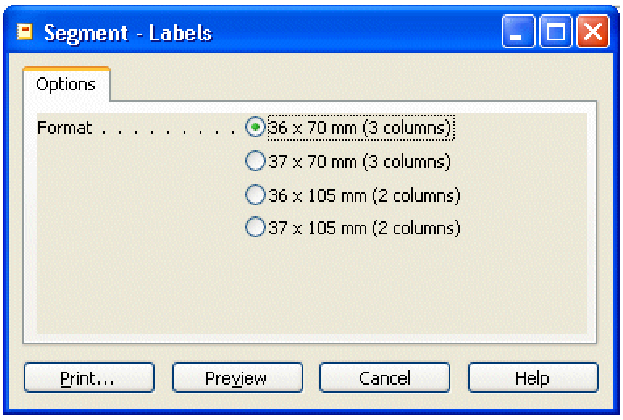
4 When you save the segmentation criteria that you have defined, the **Save Segment Criteria** window should look like this:

5 When you have set up the letter that you want to send to all the contacts in the segment using the CANVAS interaction template, the **Interaction** tab should look like this:

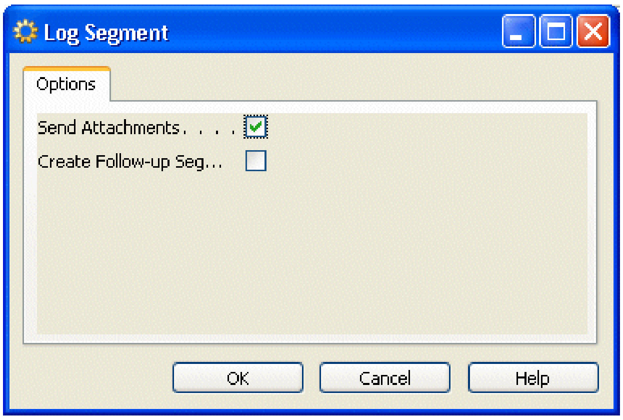


6 After you have personalized the letter to Amy E. Alberts, the program automatically enters *Unique* in the **Attachment** field to indicate that the attachment is personalized.

7 When you print the segment labels, the **Segment - Labels** window should look like this:

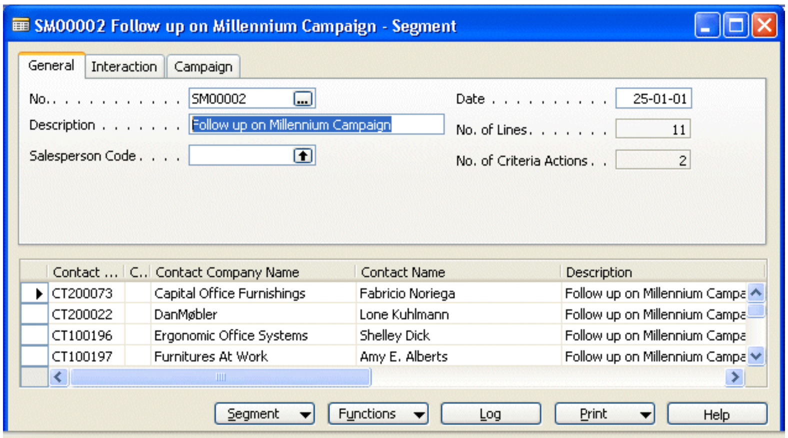


8 When you print the letters and record them as interactions in the program, the **Log Segment** window should looks like this:

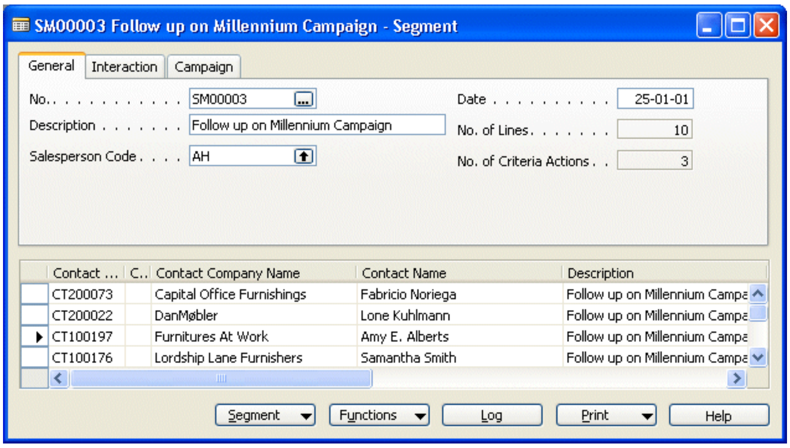


Exercise 16

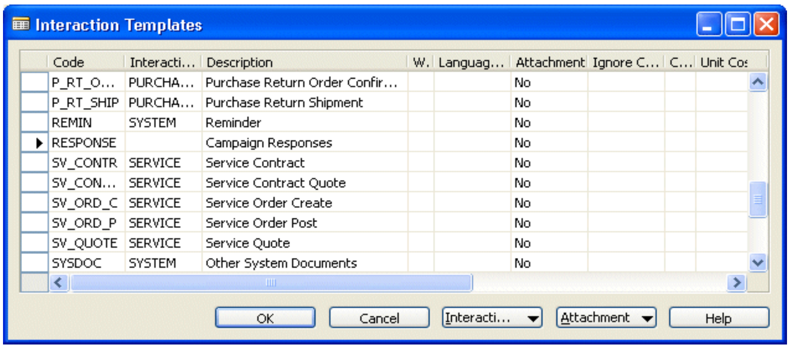
1 When you have created a segment using the segment that you have already logged, the program automatically fills in the lines in the **Segment** window with the contacts in the first segment. The **Segment** window should look like this:



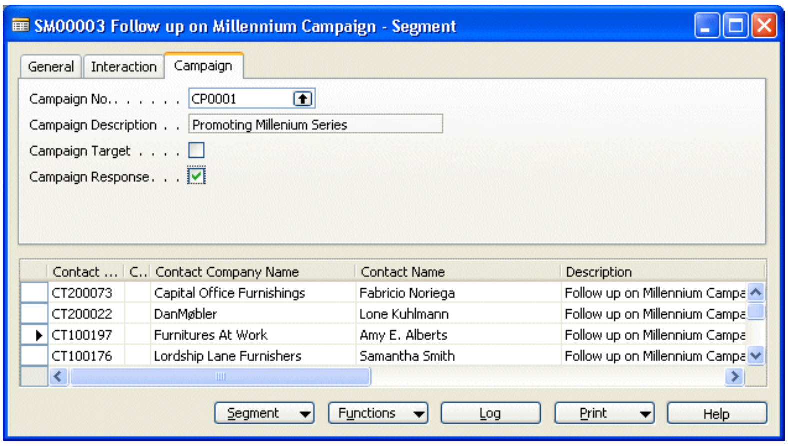
When you have manually removed the contact (Shelley Dick) who did not respond to the campaign, the **Segment** window should look like this:



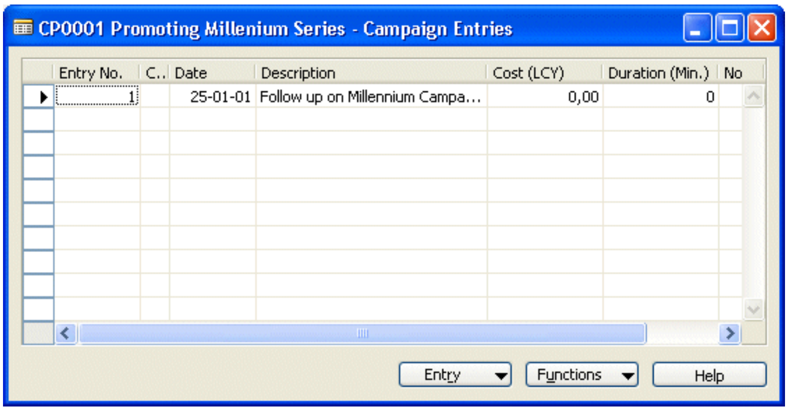
2 There is no interaction template for recording responses to campaigns. When you create one, the **Interaction Templates** window should look like this:



When you have specified that these contacts have responded to the campaign, the **Campaign** tab should look like this:

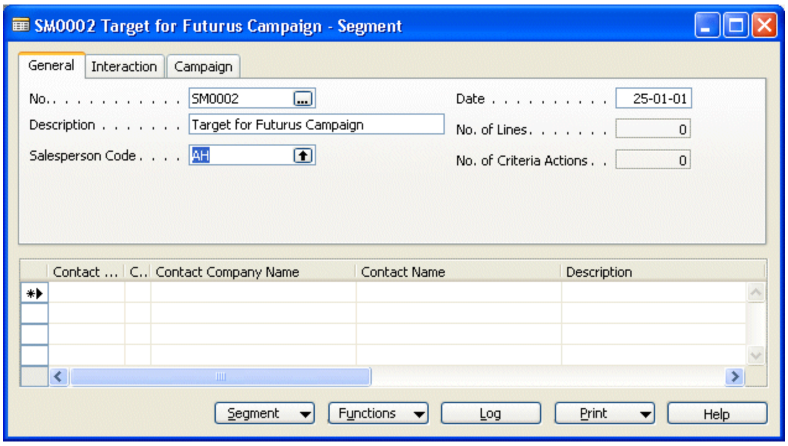


3 When you log the segment, the program automatically creates an entry for the campaign to record this action. You can view it in the **Campaign Entries** window for the Promoting Millennium Series campaign.

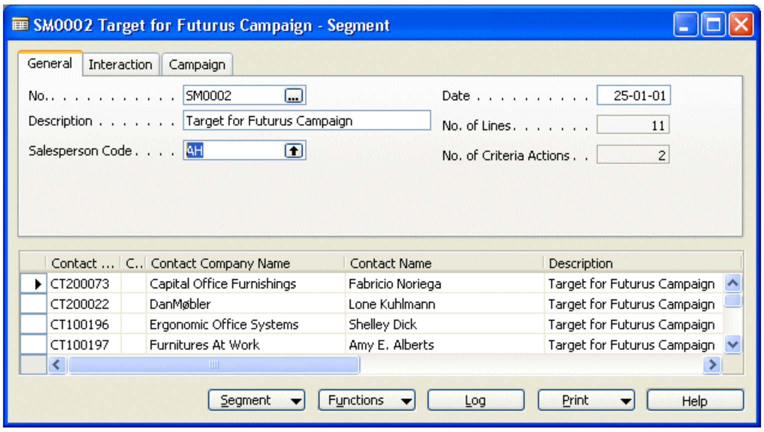


Exercise 17

1 When you have set up the new segment for the Futurus campaign, the **Segment** window should look like this:



2 When you have used the saved segment criteria to select the contacts for the new Futurus campaign, the program automatically fills in the lines of the **Segment** window with all the contacts that currently fulfill the defined criteria. The **Segment** window should look like this:


SM0002 Target for Futurus Campaign - Segment
General
Interaction
Campaign
No.
SM0002
Description
Target for Futurus Campaign
Salesperson Code
AH
Date
25-01-01
No. of Lines
11
No. of Criteria Actions
2
Contact ...
C..
Contact Company Name
Contact Name
Description
CT200073
Capital Office Furnishings
Fabricio Noriega
Target for Futurus Campaign
CT200022
DanMøbler
Lone Kuhlmann
Target for Futurus Campaign
CT100196
Ergonomic Office Systems
Shelley Dick
Target for Futurus Campaign
CT100197
Furnitures At Work
Amy E. Alberts
Target for Futurus Campaign
Segment
Functions
Log
Print
Help

Chapter 7

Task Management

This chapter contains the following sections:

- Introduction to Task Management
- Setting Up Teams and Activities
- Creating To-dos
- Assigning Activities
- Creating Recurring To-dos
- Modifying To-dos
- Sending E-Mail Meeting Invitations
- Closing, Canceling and Deleting To-dos
- Viewing Statistical Information about To-dos
- Exercises

7.1 INTRODUCTION TO TASK MANAGEMENT

In the Relationship Management application area, there are a number of tools you can use to manage your tasks. You can set up to-dos (which are individual tasks) and activities (which are groups of tasks), and assign them to individual salespeople or teams of salespeople, for completion. These features are integrated with the other parts of the application area, so that you can create interactions when to-dos are actually carried out, and you can associate the to-dos with contacts and campaigns. You can also ensure that the to-do is carried out for entire segments.

Activities

Activities are large tasks that can be broken down into several smaller tasks, or to-dos. By setting up activities you can create a number of to-dos much more quickly than if you created them individually. Once you have set up an activity, you use a wizard to assign the corresponding to-dos to salespeople, teams, contacts, or campaigns.

To-dos

To-dos are individual tasks. You can create to-dos within activities, or individually. There is a card for each to-do, which contains a variety of information about the task. To-dos can be of the type **Meeting**, **Phone Call**, or **Blank**. To-dos of the type Meeting may contain multiple participants. You can associate to-dos with contacts, salespeople or teams, campaigns, and opportunities, and you can assign each to-do a priority level and a status. You can mark a to-do closed, when it is completed or canceled, if it is no longer relevant, and/or you want to delete it.

You can create recurring to-dos, that is, tasks that must be repeated at intervals.

In the **To-dos** window you can view information about to-dos and you can customize this window to give you precisely the information you are looking for.

7.2 SETTING UP TEAMS AND ACTIVITIES

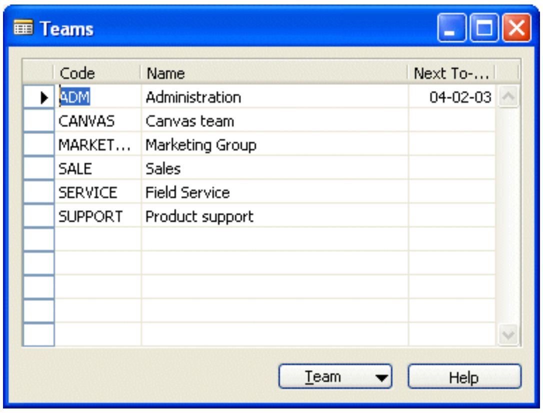
A team is a group of salespeople created for a specific purpose, such as marketing, internal audit, or some other specific function within the organization. You use teams to keep track of who is involved in completing tasks.

Activities are large tasks that consist of several to-dos, such as a marketing program, for example. You use activities to organize your tasks.

Setting Up Teams

There are two steps to setting up a team: setting up the team itself, and assigning salespeople to the team. To set up a team and assign salespeople to it, follow this procedure:

1 Click Relationship Management, Teams. The **Teams** window appears:

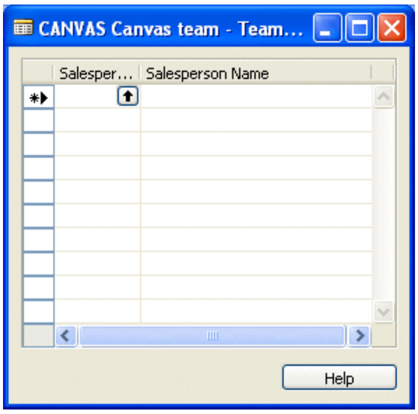


2 Press F3 to create a new line.

3 In the **Code** field, enter a code for the new team.

4 In the **Name** field, enter a name for the new team.

5 Click in the line with the team you have just created, and then click Team, Salespeople. The **Team Salespeople** window appears:



6 In the **Salesperson Code** field, click the AssistButton to see a list of salespeople, and select the desired salesperson. The salesperson's name appears in the **Salesperson Name** field.

7 Repeat the procedure for each salesperson you want to add to the team. You can add as many salespeople as necessary.

Deleting Teams

If a team is no longer relevant, you can delete it. Follow this procedure:

1 Click Relationship Management, Teams. The **Teams** window appears.

2 Select the line with the team you want to delete.

3 Press F4.

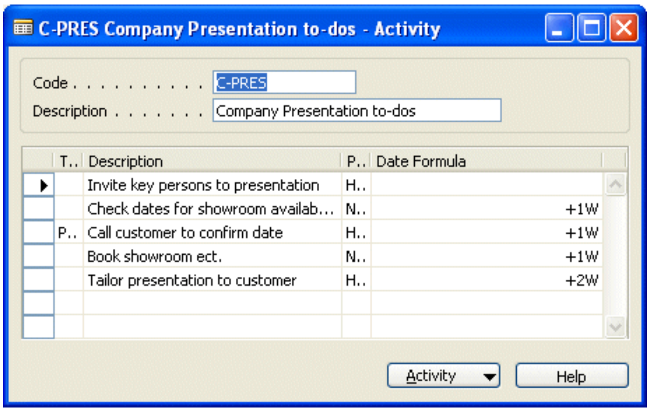
4 A message appears asking you to confirm the deletion. Click Yes.

Setting Up Activities

Activities are large tasks that consist of several to-dos. You set up an activity and the to-dos that make up that activity in the **Activity** window. You can assign each to-do a type, priority, and date formula. The date formula ensures that the to-do shows up in the **To-Dos** window under the correct date.

To set up an activity, follow this procedure:

1 Click Relationship Management, Setup, To-do, Activities. The **Activity** window appears.



2 Place the cursor in the **Code** field and press F3 to get a blank card.

3 In the **Code** field, enter a code for the new activity.

4 In the **Description** field, enter a description of the activity.

5 In the **Type** field, select the type of the first to-do that makes up the activity. If the to-do is not a meeting or a phone call, then leave the field blank.

6 In the **Description** field, enter a description of the to-do and in the **Priority** field, select a priority for the to-do.

7 In the **Date Formula** field, enter a date formula to determine the date when the to-do will be scheduled. This field follows the same conventions as all other date formula fields in the program. You can read about these conventions in the program Help.

There is a line for each to-do associated with the activity and you can include as many to-dos as you like.

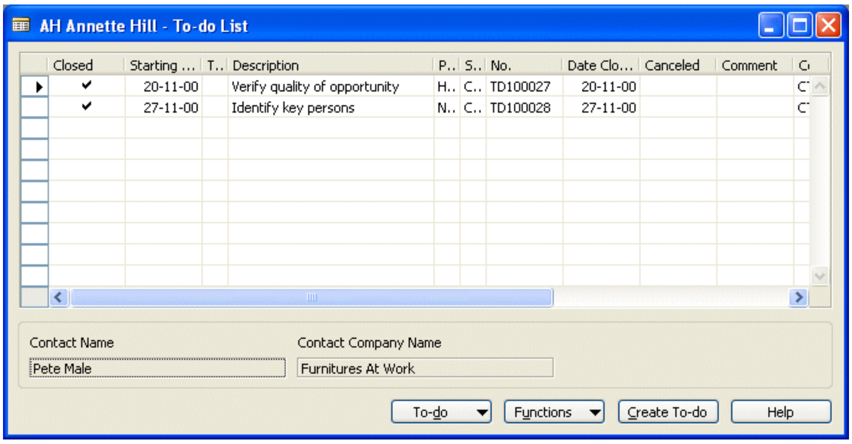
7.3 CREATING TO-DOS

You can create to-dos for all the tasks involving contacts that you want to assign to salespeople or to teams. You can only assign to-dos to employees recorded in the program as salespeople.

You create to-dos from the **To-do List** window. Depending on where you open the **To-do List** window from, the window shows to-dos either for contacts, salespeople, campaigns, or teams. The following procedure shows how to create a to-do from the salesperson card.

1 Click Relationship Management, Salespeople.

2 On the salesperson card, select the salesperson to be assigned the to-do, and then click Salesperson, To-dos.



3 In the **To-do List** window, click Create To-do. The **Create To-do** wizard appears.

4 Fill in the mandatory fields and any relevant optional fields in the first window of the wizard, and click Next.

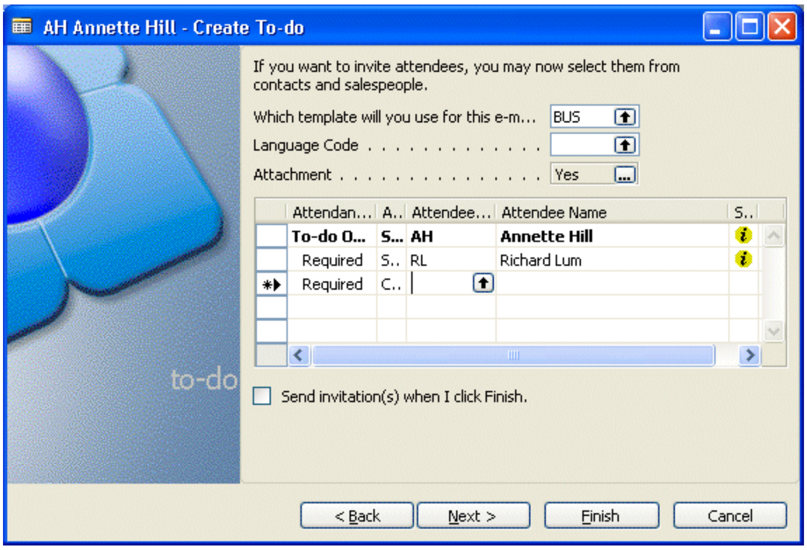
The **Description** field is a mandatory field and must be filled in before you can click Next. For to-dos of the type *Meeting*, you must also fill in the **Starting Time** field and the **Duration** field if the to-do is not an all-day event.

5 If you are creating a to-do of the type *Meeting*, in the second wizard window, select the template for e-mail invitation and its language code. The **Attachment** field shows whether the invitation for this to-do has an attachment. To view and edit the attachment, click the

AsisstButton in the field.

Attachments are only available for attendees of the type *Contact*. Attendees of the type *Salesperson* will receive a customized e-mail message.

6 Specify meeting attendees and fill in the fields for each attendee:

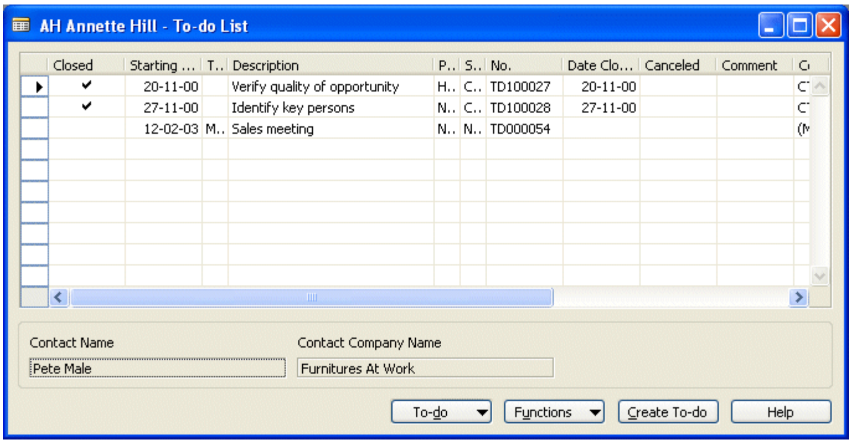


Note that information about a to-do organizer cannot be changed or deleted. The **Show Calendar** option is only available for attendees of the type *Salesperson*. The **Send Invitation** option is only available for contacts and salespeople with an e-mail address.

7 If the type of the to-do is *Blank* or *Phone Call*, in the second wizard window, you must fill in the **Salesperson Code** field or the **Team Code** field before you can click Next or Finish.

8 Fill in the other relevant fields in the following wizard windows.

When you have completed the **Create To-do** wizard, the to-do appears in the salesperson's **To-do List** window:



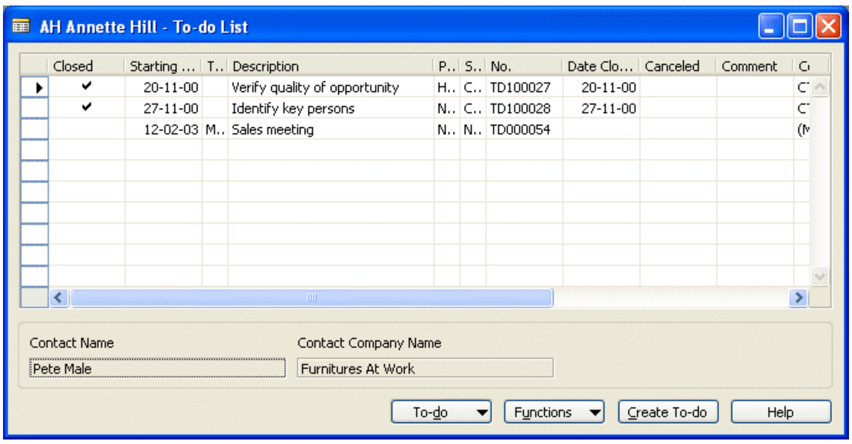
Delegating To-dos

You can delegate a to-do to another salesperson or team, for example, if the salesperson or team to which it has been assigned cannot complete it.

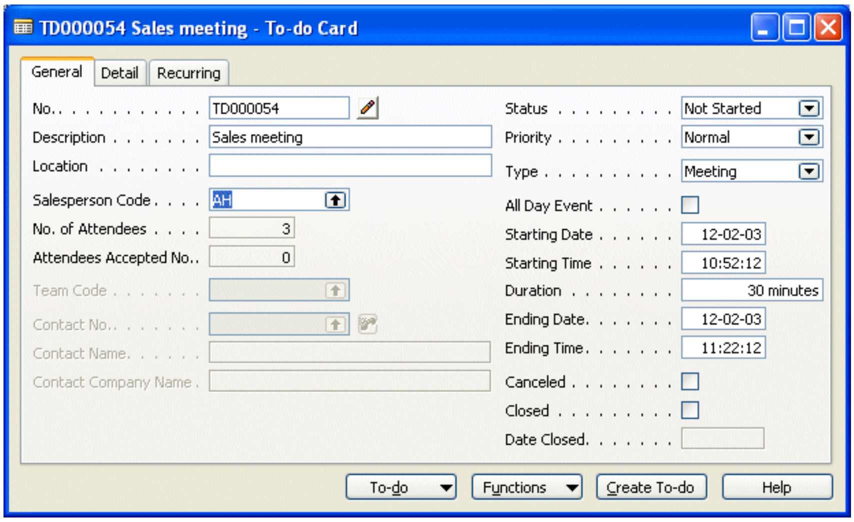
You can delegate to-dos from the **To-do List** window. Depending on where you access the **To-do List** window from, the window shows to-dos either for contacts, salespeople, campaigns, or teams. The following procedure shows how to delegate a to-do to a salesperson.

1 Click Relationship Management, Salespeople.

2 Browse to the salesperson card for the salesperson the to-do has been assigned to, and click Salesperson, To-dos.



3 In the **To-do List** window, select the to-do you want to delegate and click To-do, Card. The to-do card appears.



4 To delegate the to-do to another salesperson, click the AssistButton to the right of the **Salesperson Code** field and select the desired salesperson. The program automatically transfers the to-do from one salesperson to the other.

You cannot delegate a to-do to both a salesperson and a team. If you enter a salesperson code, the program automatically clears the **Team Code** field. If you enter a team code, the program automatically clears the **Salesperson Code** field.

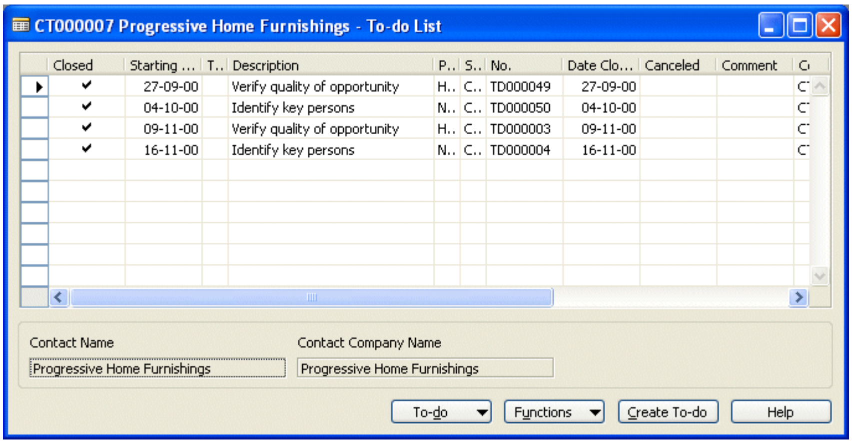
7.4 Assigning Activities

You can assign large tasks (activities), composed of several to-dos, to salespeople. Only employees recorded as salespeople in the program can be assigned activities.

You can assign activities from the **To-do List** window. Depending on where you access the **To-do List** window from, the window shows to-dos either for contacts, salespeople, campaigns, or teams. The following procedure shows how to assign activities from the contact card.

1 Click Relationship Management, Contacts.

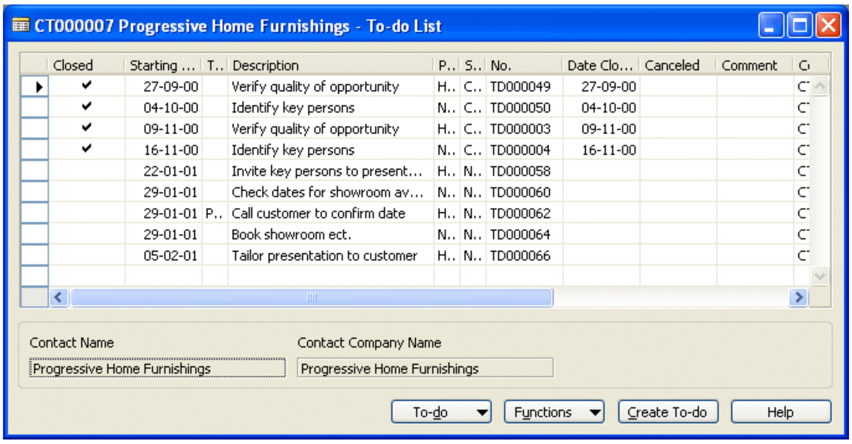
2 Find the contact you want to assign the activity to, and then click Contact, To-dos. The **To-do List** window appears:



3 Click Functions, Assign Activities. The **Assign Activities** wizard appears.

4 Fill in the mandatory fields and any relevant optional fields.

When you click Finish, the program automatically assigns all the to-dos within the activity to the contact:



CT000007 Progressive Home Furnishings - To-do List

Closed	Starting ...	T..	Description	P..	S..	No.	Date Clo...	Canceled	Comment	C
✔	27-09-00		Verify quality of opportunity	H..	C..	TD000049	27-09-00			C
✔	04-10-00		Identify key persons	N..	C..	TD000050	04-10-00			C
✔	09-11-00		Verify quality of opportunity	H..	C..	TD000003	09-11-00			C
✔	16-11-00		Identify key persons	N..	C..	TD000004	16-11-00			C
	22-01-01		Invite key persons to present...	H..	N..	TD000058				C
	29-01-01		Check dates for showroom av...	N..	N..	TD000060				C
	29-01-01	P..	Call customer to confirm date	H..	N..	TD000062				C
	29-01-01		Book showroom ect.	N..	N..	TD000064				C
	05-02-01		Tailor presentation to customer	H..	N..	TD000066				C

Contact Name: Progressive Home Furnishings

Contact Company Name: Progressive Home Furnishings

To-do | Functions | Create To-do | Help

7.5 CREATING RECURRING TO-DOS

You can create recurring to-dos for tasks that occur periodically. You specify that a to-do is recurring in the last page of the **Create To-do** wizard. To specify that a to-do is recurring, you must:

- insert a check mark in the **Recurring** field.
- specify a date formula in the **Recurring Date Interval** field.
- specify the date the program will use as the first due date.

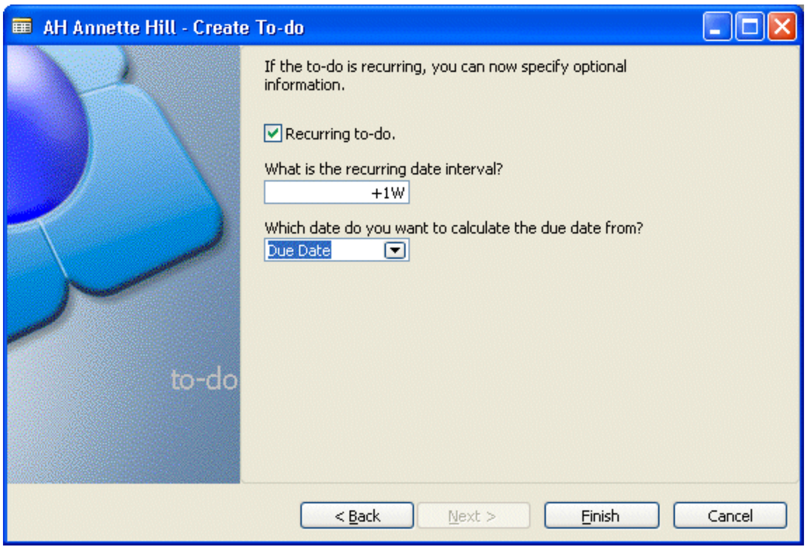
Exercise 18 **Creating a Recurring To-do**

As a sales manager, you have the weekly task of checking the performance of your sales reps. Create this recurring to-do.

Solution

You create the to-do by completing the **Create To-do** wizard, specifying in the last page of the wizard that the to-do is recurring.

The last page of the **Create To-do** wizard should look like this:



7.6 MODIFYING TO-DOS

Sometimes you may need to modify a to-do, for example to link it to a contact, or to change its priority level or status. You modify a to-do by changing the relevant information on the to-do card.

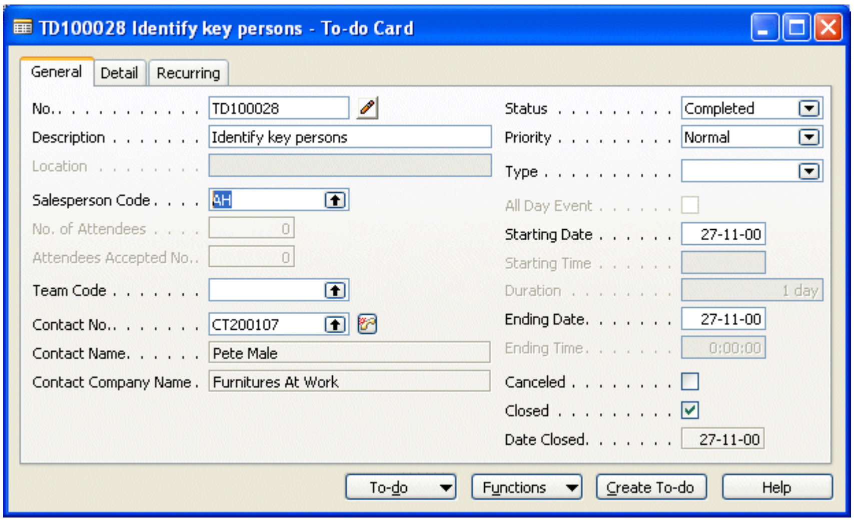
Example

You decide that the to-do *Identify key persons* should be a recurring to-do, performed each month. This to-do is targeted at contact CT200107, Pete Male. You make this change on the to-do card:

1 Click Relationship Management, Contacts and find the contact card for Pete Male.

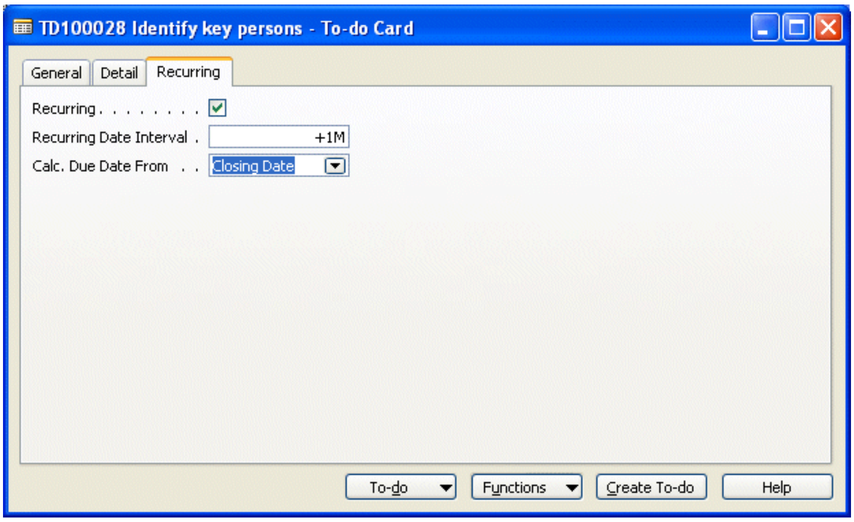
2 Click Contact, To-dos.

3 Select the relevant to-do on the list and click To-do, Card. The to-do card appears:



4 Click the **Recurring** tab and select the check box in the **Recurring** field. Now you can enter information in the other fields on the tab.

5 Fill in the other two fields with the appropriate information. The **Recurring** tab looks like this:



Modifying To-dos of the Type Meeting

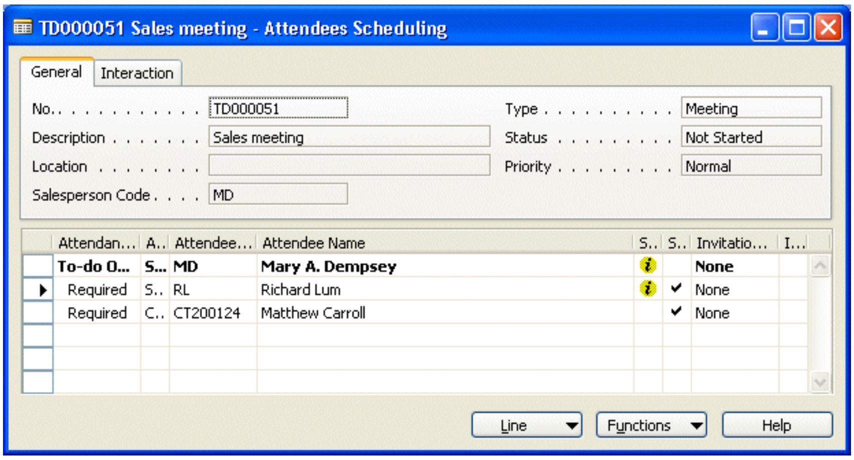
Sometimes you may need to add, delete or change an attendee for a to-do of the type *Meeting*, change the to-do organizer, or change the attachment which will be sent to attendees as a meeting invitation. You can do this from the Attendee Scheduling card for that to-do.

To modify to-do attendees, do the following:

1. Click Relationship Management, Contacts and find the contact card for the salesperson that created the to-do.

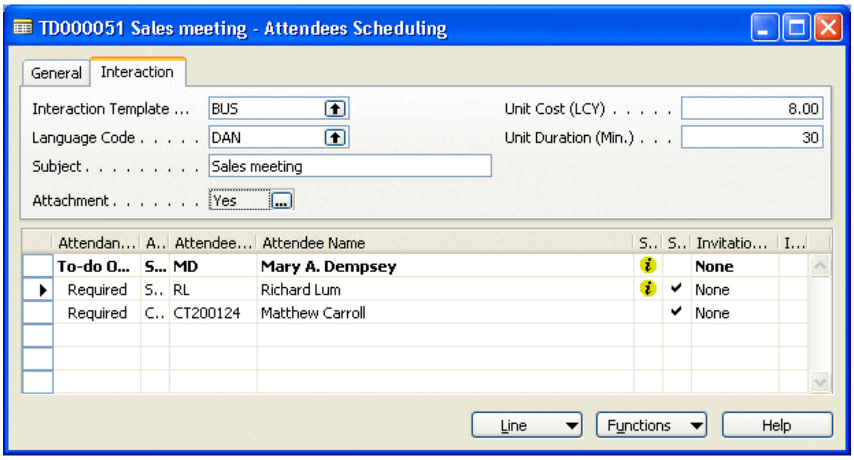
2. Click Salesperson, To-dos and select the to-do of the type *Meeting* which you want to modify.

3. Click To-dos, Attendee Scheduling. The **Attendee Scheduling** card looks like this:



4 Modify the to-do attendees. You can also change the to-do organizer. The to-do organizer is displayed in bold in the first line of the Attendee Scheduling card. Remember that only salespeople can be meeting organizers.

5 To change the attachment for the to-do, go to the **Interaction** tab and click the AssistButton to the right of the **Attachment** field.



7.7 SENDING E-MAIL MEETING INVITATIONS

You can send meeting invitations in one of the following ways.

If you have synchronization with Microsoft Outlook enabled, this will allow you to send attendees a meeting request in Outlook with a meeting invitation attachment inserted. This will also enable you to receive acceptance/decline confirmations from meeting attendees. For more information about integration of Navision to-dos and contacts with Outlook tasks, calendar items, and contacts, see chapter 8, “Outlook Integration”.

Sending E-mail Invitations Using MAPI

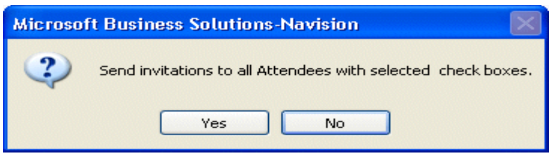
You can also send meeting invitations without synchronization with Outlook enabled. In this case, an attendee will not receive an Outlook meeting request, but a message informing him of the meeting in his Inbox, and you will not be able to receive acceptance/decline confirmations from him.

To send a meeting invitation, do the following:

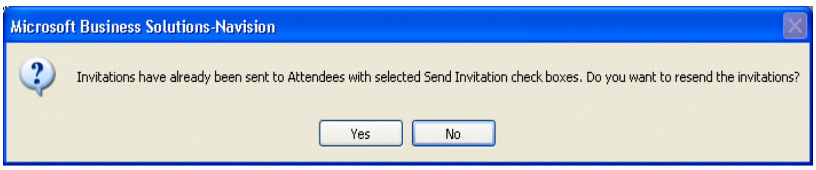
1 Click Relationship Management, Salespeople. Go to Salesperson, List, select the salesperson that created the to-do, and click OK.

2 On the To-do card, select the to-do for which an invitation has to be sent. Click To-do, Attendee Scheduling.

3 Select the check box in the Send Invitations field for attendees you want to send an invitation to, and click Functions, Send Invitations. Confirm the subsequent message.

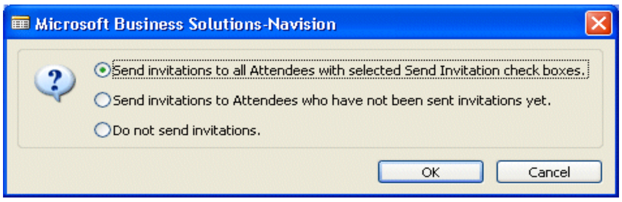


4 If you have already sent invitations to the attendees and would like to resend them, click Functions, Send Invitations, and confirm the subsequent message.



5 If you have not sent invitations to some attendees or added new ones, and would like them to receive an invitation, select the Send Invitation

fields for those attendees, click Functions, Send Invitations. The following message appears:



6 Select the appropriate option and click OK.

7 Confirm the subsequent messages asking permission for Navision to access an e-mail address stored in Outlook to send the e-mail on your behalf.

In order to send an invitation to attendees of the Contact type, the to-do must contain an attachment. Invitations can only be sent to those attendees for which an e-mail address is specified. You can add or edit an attendee's e-mail in the Salesperson/Purchaser Card or Contact Card.

Attachments are available only for attendees of the Contact type. The following customized text will be sent to attendees of the Salesperson type:

Dear [SP Name],

You are hereby invited to attend the meeting, which will take place on [date] at [time].

Yours sincerely,

[Meeting Organizer's Name]

[date sent] [time sent]

You cannot modify this text.

Notes

When an invitation is sent, a check mark for that attendee appears in the Invitation Sent field.

A log is created in the Interaction Log Entries table for all Contacts to whom invitations were sent.

Send Invitation is not available for Meeting Organizer.

7.8 Closing, Canceling and Deleting To-dos

You can mark completed to-dos as closed. Then you can, for example, choose to view only current to-dos in a **To-dos** window. If a to-do is no longer relevant, you can cancel it. If you have many to-dos that are canceled, you may want to delete some or all of them.

Closing or Canceling To-dos

To close or cancel a to-do, follow this procedure:

1. In the **To-do List** window, select the line with the to-do you want to close or cancel.

2. Click To-do, Card.

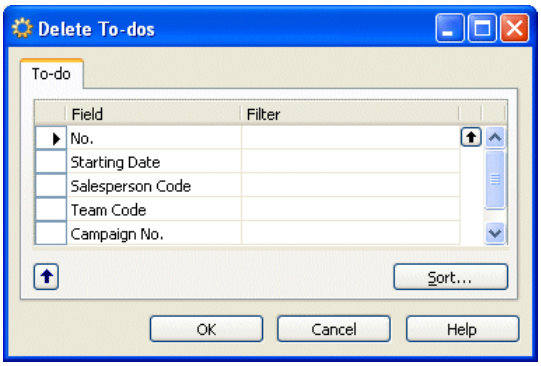
3. Select the check box in the **Closed** field or in the **Canceled** field.

If you select the check box in the **Closed** field, you will be prompted for a reply to whether you want to register the interaction in the Interaction Log Entries. If you click Yes, the **Create Interaction** wizard appears. Fill it out as described in section 5.3.

Deleting To-dos

You can only delete canceled to-dos. You use filters to choose which to-dos to delete. Follow this procedure:

1. Click Relationship Management, Periodic Activities, Delete, Canceled To-dos. The **Delete To-dos** window appears:



2. In the **Field** field, add or remove filters to select the criteria you want to use to delete a to-do.

3 In the **Filter** field, click the AssistButton to the right of the field to see the canceled to-dos.

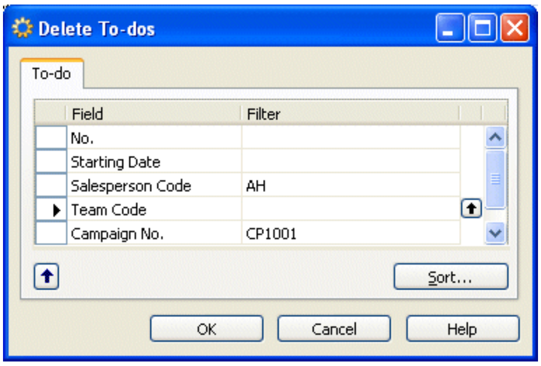
4 Select the to-do that you want to delete and click OK.

After you have deleted a to-do, the program automatically removes it from the **To-dos** window.

Example

Annette Hill (AH) has a large number of completed to-dos. You want to delete those for campaign CP1001, Increase sale.

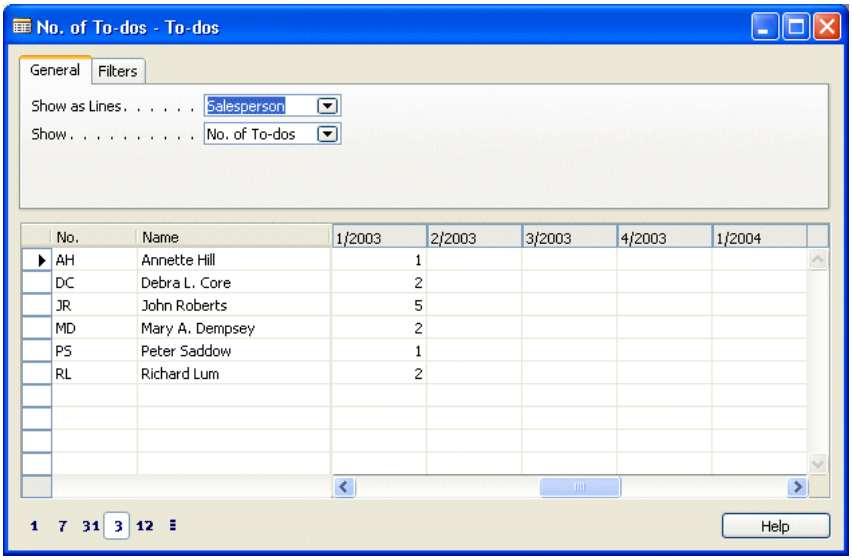
To delete the to-dos, first cancel each to-do, then fill in the **Delete To-dos** window like this:



7.9 VIEWING STATISTICAL INFORMATION ABOUT TO-DOS

You can view information about to-dos in several different windows. We have already seen the **To-do List** window, which lists the to-dos for a specific team, contact, salesperson or campaign, and the to-do card, which contains all the details about a specific to-do.

You can view statistics about to-dos in the **To-dos** window. You open the window by clicking Relationship Management, To-dos:



The window has two tabs at the top and lines at the bottom. On the **General** tab you can select whether to view the number of to-dos by salesperson, team, contact, or campaign. On the **Filters** tab you can set different filters to ensure that you view statistics only for those to-dos you are interested in.

The lines are divided into two sections, with the categories (salesperson, team, contact, or campaign) on the left and the number of to-dos divided into periods, on the right. You can select the time period (day, week, month, quarter, year) in the bottom left-hand corner using the interval buttons.

Example: Viewing Information about To-dos

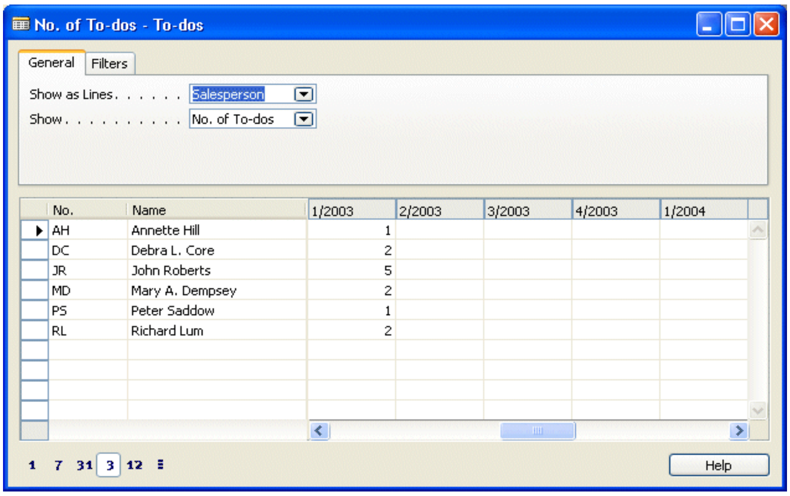
You want to see how many to-dos relate to contact company CT000007, Progressive Home Furnishings. Follow this procedure:

1 Click Relationship Management, To-dos.

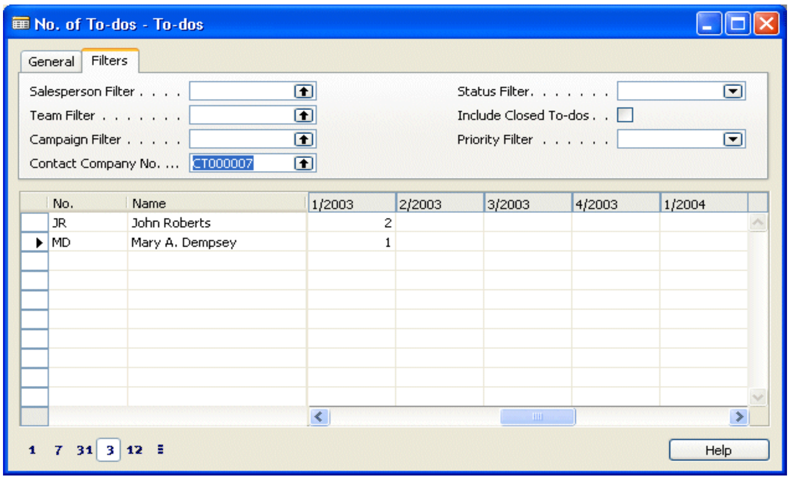
2 Click the **General** tab.

3 In the **Show as Lines** field, select *Salesperson*.

4 In the **Show** field, select *No. of To-dos*. The window will look something like this (depending on which interval has been selected in the bottom left-hand corner and which dates are displayed in the lines on the right):



5 On the **Filters** tab, in the **Contact Company No.** field, click the AssistButton and select the line with *Progressive Home Furnishings*. The window now looks something like this:



You can see the number of to-dos by salesperson that relate to the contact company, Progressive Home Furnishings.

7.10 EXERCISES

Exercise 19 **Creating Teams of Salespeople**

You want to create a new team of salespeople to work on promoting the Millennium Bicycle series and you would like one of your salespeople, Debra L. Core, to send a letter to Patrick Dalle from Lovaina Contractors.

1 Create a new team (the *Millennium Promotion* team) to work on promoting the Millennium Bicycle series. Include Annette Hill, Debra L. Core, Peter Saddow, and Richard Lum in the team.

2 Assign Debra L. Core a to-do to send a letter to Patrick Dalle from Lovaina Contractors, with detailed information about the Millennium bicycle series.

3 Create an interaction for the to-do that you have just assigned. You can do this from the salesperson/purchaser card for Debra L. Core, or from the contact card for Patrick Dalle from Lovaina Contractors.

Exercise 20 **Assigning Activities**

You want to assign a new activity (producing a brochure about the Millennium bike) to the new team and then delegate the to-dos in the activity from the team to the individual salespeople.

1 Set up an activity that is made up of five to-dos to create a brochure promoting the Millennium bicycle series for Lovaina Contractors. Make up your own to-dos or use these: analyze market data, prepare brochure text, meet with designer, meet with printer, and send brochure and cover letter.

2 Assign the activity to the Millennium promotion team.

3 Delegate the to-dos in the activity from the team to the individual team members, making sure that two of the to-dos are delegated to Debra L. Core.

Exercise 21 Deleting Closed To-dos

Later, you want to view the details of the to-dos of particular salespeople in the team, and you also want to delete some of the closed to-dos.

1 Find out how many to-dos Debra L. Core and John Roberts have in the first quarter of 2001 and view the number of to-dos by priority.

2 Debra L. Core has several closed to-dos. Delete the ones dated November 18, 2000.

Exercise 22 Adding Attendees to a To-do of the Meeting Type

You want to add an attendee to a to-do of the type meeting that is already created.

1 Create a to-do of the type meeting with Annette Hill as the to-do organizer, Richard Lum and Yvonne McKay (CT 100160) as meeting attendees.

2 Add Ann Beebe (CT 100209) as a new attendee.

Exercise 23 Sending E-Mail Meeting Invitations Using MAPI

Create a meeting to-do with Annette Hill as the to-do organizer and with Richard Lum and Yvonne McKay (CT 100160) as the meeting attendees.

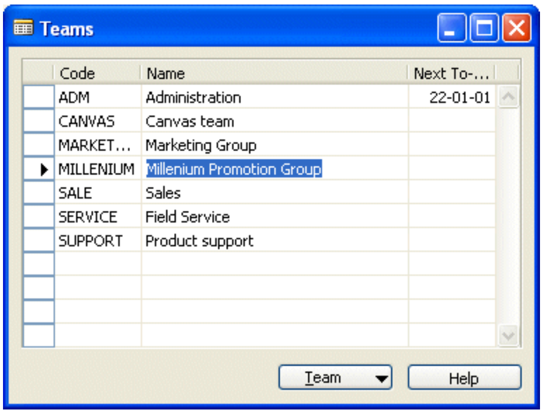
Do not send meeting invitations on finishing the Create To-do wizard. After the to-do is created, send invitations using MAPI (while not synchronized with Outlook).

Later, you learn that Yvonne McKay has not received your invitation. Resend the invitation to her.

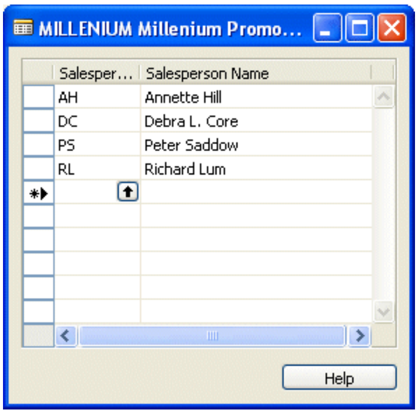
Solutions

Exercise 19

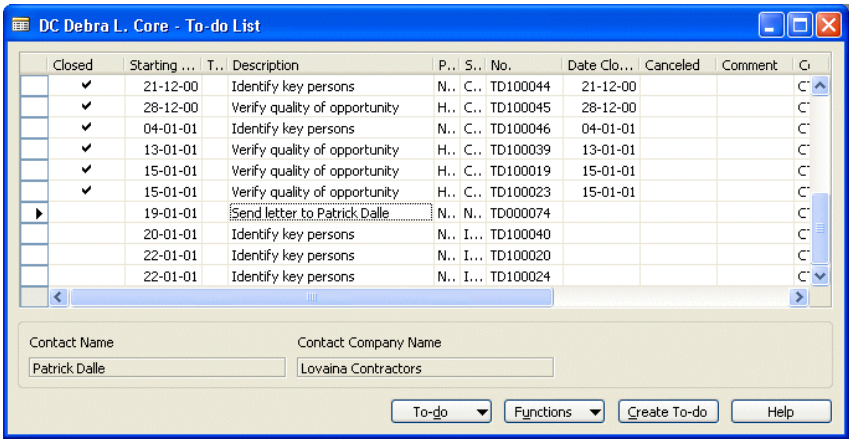
1 When you have created the Millennium Promotion team, the **Teams** window should look like this:



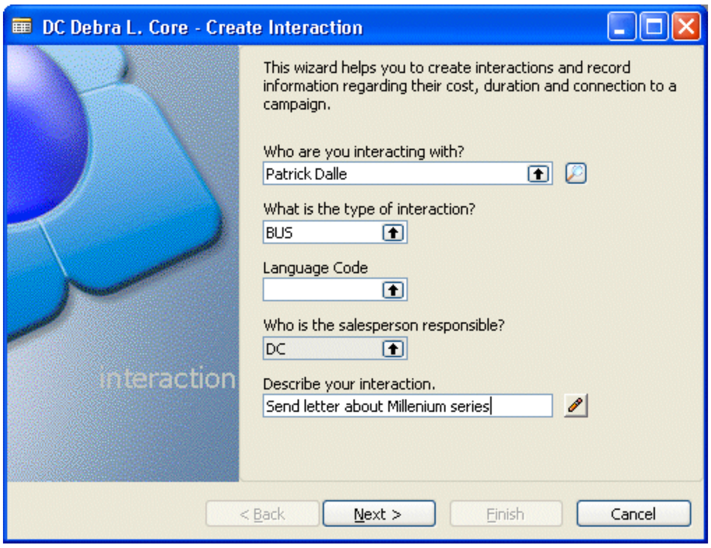
The **Team Salespeople** window should look like this:



2 When you have created the to-do and assigned it to Debra L. Core, the to-do should appear in Debra L. Core's **To-do List** window:

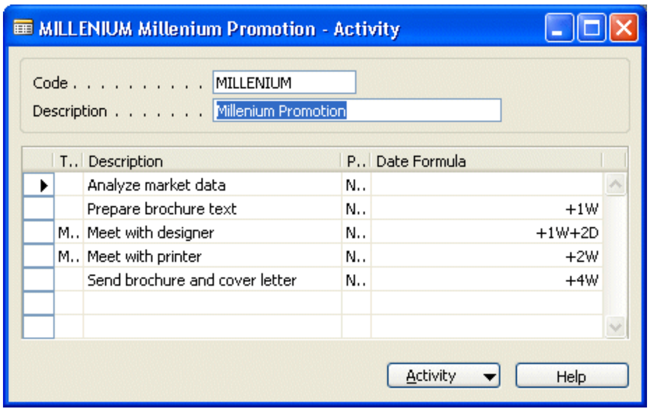


3 When you create an interaction for the to-do from Debra's salesperson card, the first page of the **Create Interaction** wizard should look like this:

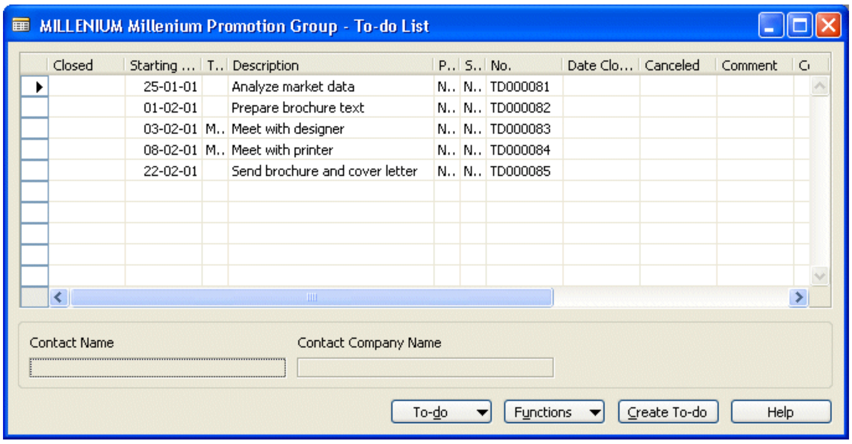


Exercise 20

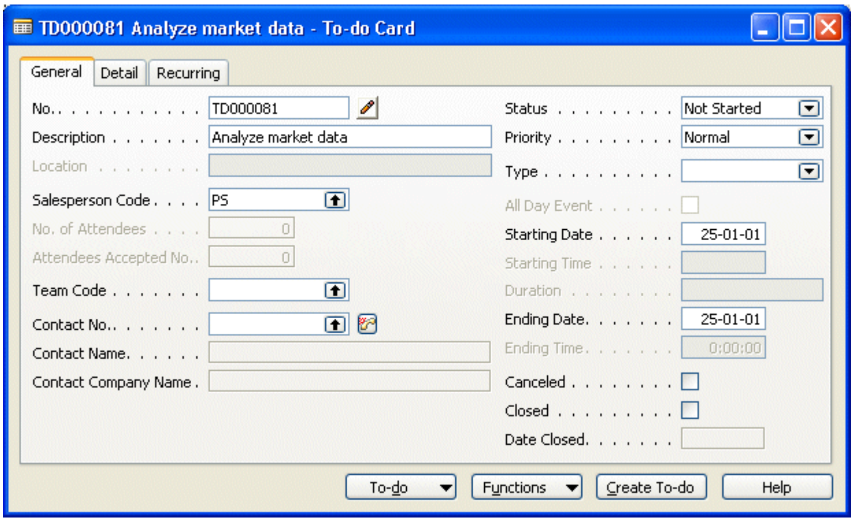
1 When you have set up the activity made up of five to-dos, the **Activity** window should look like this:



2 When you have assigned the activity to the Millennium Promotion team using the **Assign Activity** wizard, all the to-dos for the activity appear in the **To-do List** window for the team:

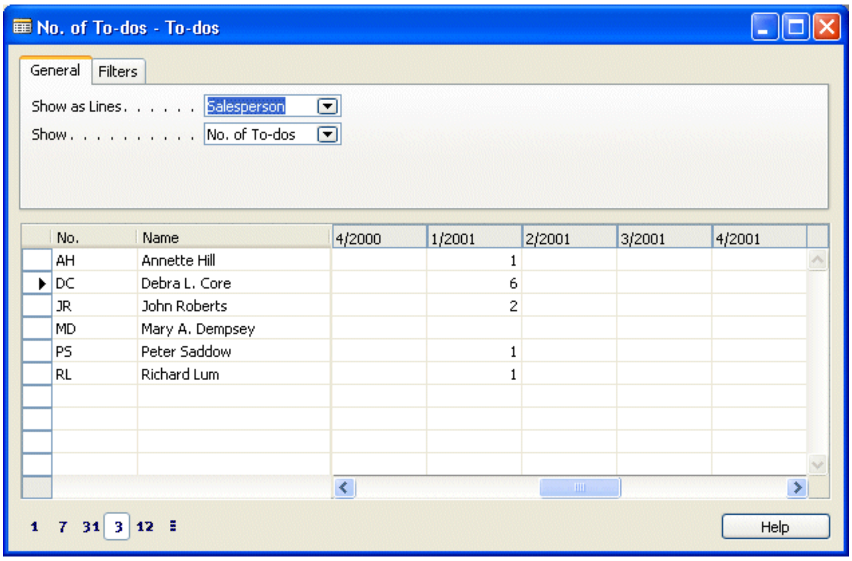


3 You can delegate the to-dos from the to-do card for each to-do, selecting the desired team member in the **Salesperson Code** field. For example, here is the to-do card for the first to-do, now delegated to Peter Saddow:

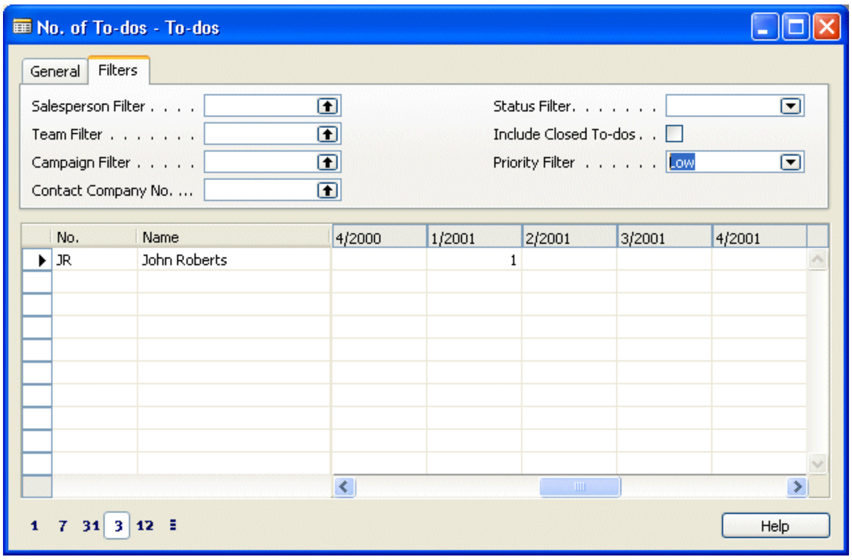


Exercise 21

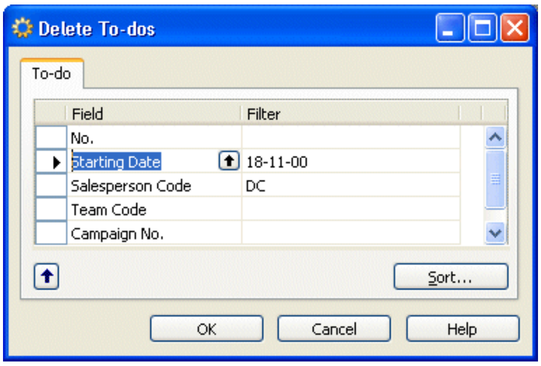
1 When you find out how many to-dos Debra L. Core and John Roberts had in the 1st quarter, the **To-dos** window should like this (your number of to-dos may differ from those below):



When you view the number of to-dos by priority, the **Filters** tab, when *Low* is selected, should look like this:

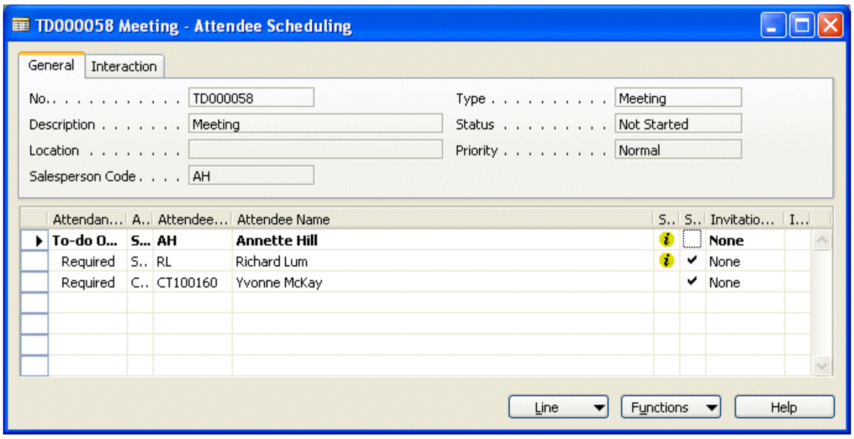


2 Remember that you can only delete to-dos that have been canceled. To cancel each to-do, select the check box in the **Canceled** field on each to-do card. When you delete Debra L. Core's to-dos, the **Delete To-dos** window should look like this:



Exercise 22

1 When you have created the to-do of type meeting, the **Attendee Scheduling** window should look like this:



2 Click in the Attendee Type field in the new line of the table and select Contact.

3 Click in the Attendee No. for that line and click the AssistButton to the right of this field. Find Ann Beebe in the list of contacts and click OK. Click in the Attendee Name field to display the name of the new attendee.

Exercise 23

1 Click Relationship Management, Salespeople.

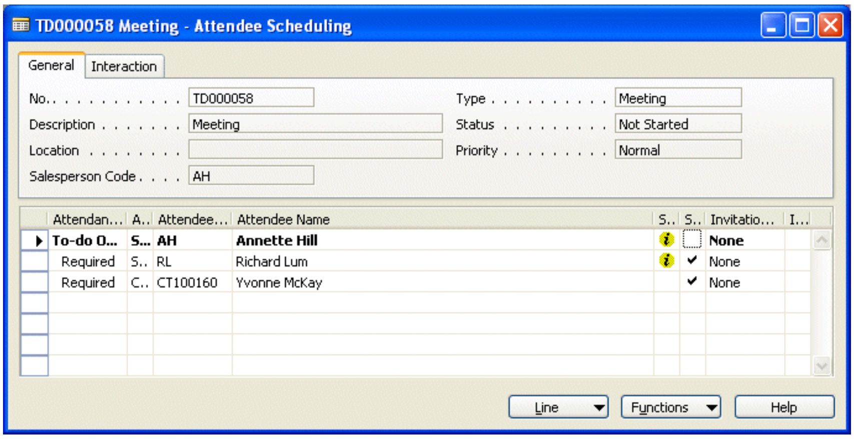
2 On the salesperson card, select Annette Hill, and click Salesperson, To-dos.

3 In the **To-do List** window, click Create To-do. The **Create To-do** wizard appears.

4 Fill in the mandatory fields and any optional fields in the wizard with the information, as described in the exercise.

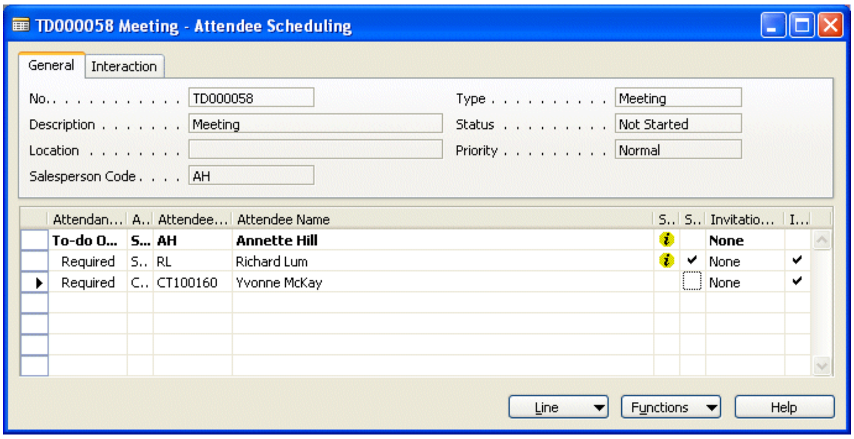
5 In Annette Hill's To-do list, select the to-do that you have created and click To-do, Attendee Scheduling.

6 Make sure that the Send Invitation check box is selected for each attendee.

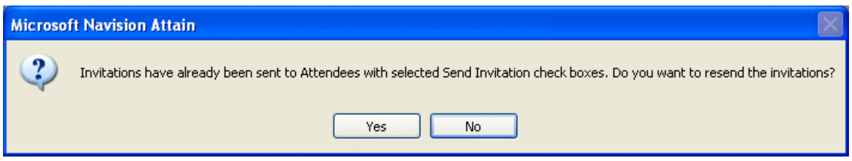


7 Click Functions, Send Invitations. Confirm the subsequent message.

8 Clear the Send Invitation check box for Yvonne McKay, and click Functions, Send Invitations.



9 Confirm the subsequent message.



Chapter 8

Outlook Integration

This chapter introduces a new feature in the Relationship Management area – Outlook Integration. This feature gives you the possibility to integrate contacts and to-dos in Navision with contacts, tasks and calendar items in Outlook.

This chapter contains the following sections:

- Introduction to Outlook Integration
- Setting Up Outlook Integration
- Integrating Contacts
- Integrating To-dos
- Synchronizing Data
- Conflict Resolution and Error Handling
- Exercises

8.1 INTRODUCTION TO OUTLOOK INTEGRATION

In today's business environment, using e-mail has becoming a more and more popular and important tool for interacting with external contacts. E-Mail software allows you not only to send messages, but also to plan work tasks, make appointments and collect relevant information about your business contacts.

It is therefore extremely important to have the ability to integrate Navision products with the most popular e-mail software on the market. This feature integrates Outlook with Navision.

To let everybody in an organization know as much as possible about the ongoing relations with a contact, it is essential to have as much exchanged information stored for public use as possible. In this case anyone can continue exactly where another salesperson "left off" with a customer after the last interaction. It is also important to be able to plan your meetings and appointments in Outlook and immediately get the same information in Navision. This will save you a lot of time and prevent you from doing unnecessary duplicate work.

This solution includes integration of Outlook contacts, tasks and calendar items with Navision contacts and to-dos.

With the help of the Navision and Outlook integration functionality, you can do the following:

- Integrate calendar items, that is, appointments, meetings and events in Outlook with to-dos in Navision.
- Integrate tasks in Outlook with to-dos in Navision.
- Transfer contacts from Outlook to Navision and back.
- Generally synchronize the data in both Outlook and Navision.

8.2 SETTING UP OUTLOOK INTEGRATION

Before you can use the Outlook Integration feature, you must install the CDO component in Outlook. To install the CDO component from the Control Panel, follow this procedure:

1 Click Add/Remove programs.

2 Select Microsoft Office, Change, and Add/Remove Features.

3 Expand the Outlook Branch and select the item called Collaboration Data Objects and set it to Run from my computer.

4 Click Update Now, and then click OK.

During the setup you specify different parameters that the program will use when synchronizing the data. The most important are the Outlook folders that you will retrieve information from.

To set up the Outlook Integration parameters, do the following:

1 Click Relationship Management, Salespeople. The **Salesperson/Purchaser Card** appears.

2 On the **Outlook Integration** tab, select the check box in the **Enable Synchronization** field. A message will appear asking you to allow access to your Outlook mailbox for external applications. Allow access for the time you need and click Yes.

Note

You cannot enable the synchronization if you have not installed the Outlook CDO component. To install it, follow the procedure described above.

All the other fields on the tab are activated now.

3 In the **Navision User ID** field, specify the ID of the salesperson by clicking the AssistButton to the right of the field and selecting from the list.

4 In the **Outlook Profile Name** field, specify the name of the Outlook profile by clicking the AssistButton and selecting from the list.

Note

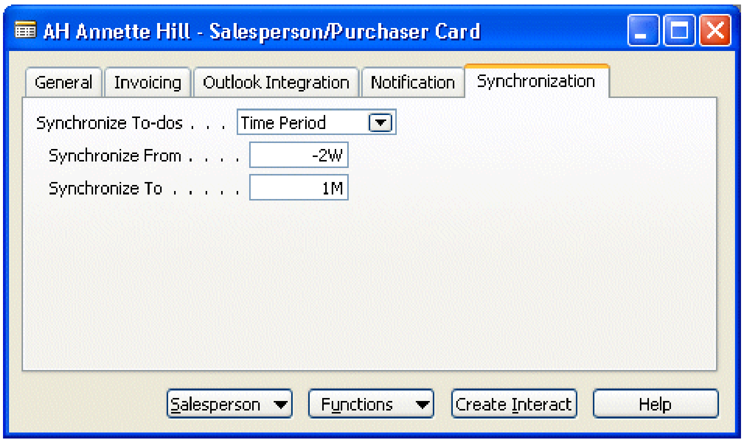
To be able to set up Outlook Integration properties, each salesperson must have a unique Outlook user name. If an Outlook user name is already assigned to another salesperson, a message will appear during the setup informing you that this Outlook user name is already in use.

5 Click Browse next to the **Outlook Contacts Folder Name** field. In Outlook, a message may appear asking you to allow access to your mailbox for external applications. Allow access for the time you need, and click Yes. Select the Outlook folder where you want to store the synchronized Navision contacts.

6 Click Browse next to the **Outlook Tasks Folder Name** field. In Outlook, a message may appear asking you to allow access to your mailbox for external applications. Allow access for the time you need, and click Yes. Select the Outlook folder where you want to store the synchronized Navision to-dos of the Blank or Phone Call type.

7 Click Browse next to the **Outlook Calendar Folder Name** field. In Outlook, a message may appear asking you to allow access to your mailbox for external applications. Allow access for the time you need, and click Yes. Select the Outlook folder where you want to store the synchronized Navision to-dos of the Meeting type.

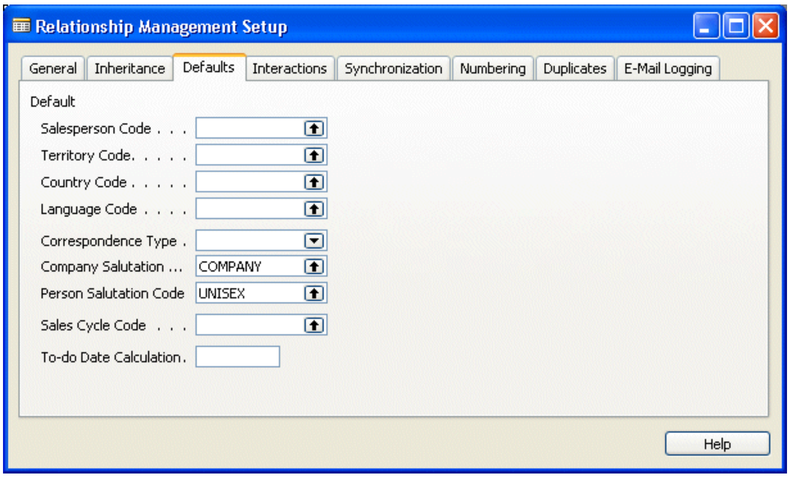
8 On the **Synchronization** tab, you can set up a period within which you want to synchronize your to-dos with Outlook tasks and calendar items. To do so, in the **Synchronize To-dos** field, select the *Time Period* option. And then enter the date formulas in the **Synchronize From** and **Synchronize To** fields. The default values in the two fields are *-1W* and *3M* respectively, but you can change this. For example, if you want to synchronize with Outlook only the to-dos within the period that starts two weeks before today and ends one month after today, enter *-2W* in the **Synchronize From** field and *1M* in the **Synchronize To** field.



Note

The program will use the system date as today's date when calculating the synchronization period each time you synchronize.

9 Click Relationship Management, Setup, Relationship Mgt. Setup. On the **Defaults** tab, in the **Default To-do Date Calculation** field, enter the to-do date calculation formula that you want the program to use to calculate the ending date for to-dos in Navision if you haven't entered any due date in the Outlook task. If you leave the field blank, today's date is applied.



You can choose a profile only if Outlook is set up as a default mail client. You should use the same profile to run Outlook and to set up Outlook synchronization in Navision.

When you change an Outlook folder that contains synchronized items, all Navision records that you subsequently synchronize will be stored in a new folder. But the records synchronized before the change will continue to be synchronized with the items in the old folder.

In order to avoid this, you should start the **Synchronize with Outlook** batch job to get the latest data in both applications, and then delete the synchronized Outlook items in the old folder. On the **Outlook Integration** tab of the **Salesperson/Purchaser Card,** specify the new folder and then run the **Synchronize with Outlook** batch job. All Navision records will be synchronized in the new folder.

After you have completed setting up the Outlook Integration, the program is ready to start automatic integration of Navision contacts and to-dos with Outlook contacts, tasks and calendar events. For example, if you create a new contact in Navision, it will appear in the corresponding contacts folder in Outlook as well.

When Navision tries to access the information stored in Outlook, a warning message appears asking you to allow access for the external application. Sometimes this warning message window does not appear on top of all the windows on the screen. Therefore, you have to switch to Outlook to be able to operate with the warning and then return to Navision. Warning messages may appear when you start Navision or when you enable the synchronization. For security reasons the maximum time interval you can set for external access to Outlook is 10 minutes.

8.3 INTEGRATING CONTACTS

When you integrate your contacts in Navision with the Outlook contacts in the Outlook folders you have specified for synchronization (see the **Setting Up Outlook Integration** section), your contact records in Navision and Outlook become identical. This saves you the trouble of manually copying your contacts from one application to the other.

It means that when you create, update or delete a contact in Navision, the same contact will be created, updated or deleted in Outlook.

Similarly, when you create or update a contact in Outlook (but only contacts in Outlook folders you have specified for synchronization), it will automatically be created or updated in Navision as well.

Note

If you delete a contact in Outlook, the contact in Navision will not be deleted.

Synchronization of city, post code, and country information is a one-way process, that is from Navision to Outlook. This means that if you enter the city, post code, and country names in Outlook, they will be overwritten by Navision after the next synchronization.

This is because country, city, and post codes are stored in separate tables in Navision, which means that unique proper codes have to be obtained or generated. Names of countries are different in Outlook and Navision, which makes it difficult to match them (for example, Great Britain and United Kingdom). Also, localized versions of Outlook store country names in different languages.

When you are operating with several business entities or companies (like if, for example, Cronus had several subsidiaries), we recommend that you create different folders for contacts from different companies. This is because if you use the same Outlook contact folder to store contacts from different companies, the contacts from one company may accidentally be imported into the contact folder of another company when you synchronize with Navision.

Importing Contacts from Outlook

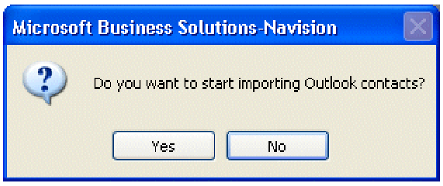
You may want to have all your Outlook contacts transferred to Navision at once. This is useful when you start using the Outlook Integration feature.

Before now, you have been working with Outlook and Navision as two independent applications. So both applications contain a lot of data that you would like to be interchanged. Also, when you are working with Outlook while Navision is not running, the Outlook items will not be created in Navision. Therefore, it is a good idea to import the items later when you open Navision.

To import contacts from Outlook, do the following:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Import from Outlook.

2 Click Import Contacts from Outlook. Confirm the subsequent message.



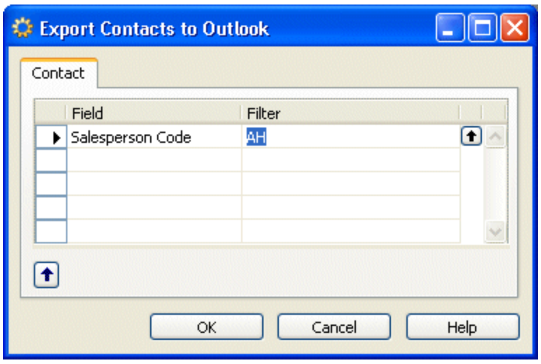
Exporting Contacts to Outlook

If you want to have all the contacts from Navision in your Outlook folders, you need to export Navision records. As with importing Outlook contacts, this will definitely be useful when you use the Outlook Integration feature for the first time.

To export contacts from Navision to Outlook, follow this procedure:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Export to Outlook.

2 Click Export Contacts to Outlook. The **Export Contacts to Outlook** batch job request window appears:



3 Set a filter to define which Navision contacts that you want to be synchronized with Outlook contacts. You can set additional fields by clicking the **Field** field, and then clicking the AssistButton to the right of the field and selecting from the list.

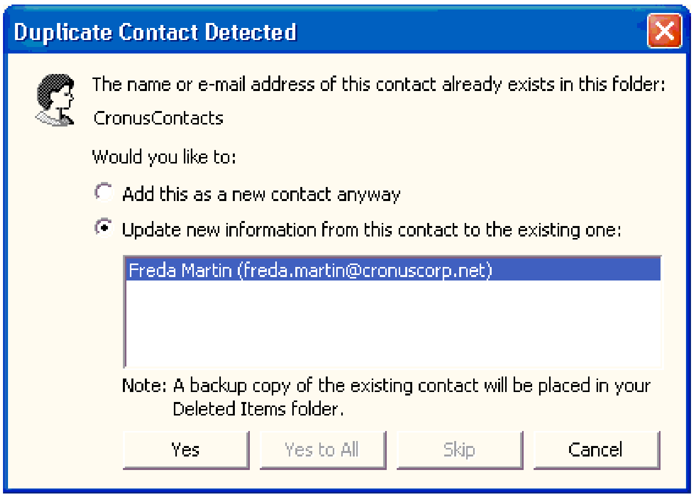
4 Click OK to start exporting contacts to Outlook.

Restoring Deleted Outlook Contacts

If you restore an Outlook contact that was previously synchronized with Navision by moving it from your Deleted folder back to the contacts folder that is synchronized with Navision, and the corresponding contact still exists in Navision, the program will restore the link between these two contacts and they will be synchronized. In case the corresponding Navision contact has been deleted, the new corresponding contact will be created in Navision.

When you restore an Outlook contact which is a person, and the contact company it belongs to has been deleted in Navision, then the corresponding contact in Navision will be created as an independent contact person.

If you restore a deleted Outlook contact whose corresponding contact in Navision has been changed after it was deleted in Outlook, and later another contact is created in Outlook with the same name or e-mail address, the following message will appear:



Depending on the option you select, either a new contact will be added to your Outlook contacts folder, and the new corresponding contact will be created in Navision in the same company, or the existing contact will be updated. In the latter case, all the changes that might have been made to the contact in Navision since the corresponding Outlook contact was deleted will be overwritten by the data from this restored contact.

Viewing Outlook Contacts from Navision

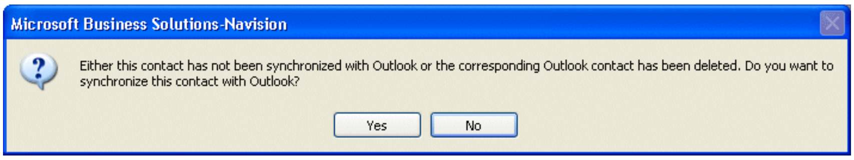
You can view Outlook contacts synchronized with Navision contacts from Navision. You can do that from the **Contact Card** or **Contact List** windows. You can view the contacts that are assigned to you as well as those that belong to other salespeople within your company.

To view an Outlook contact that is assigned to you, do the following:

1. Click Relationship Management, Contacts. The **Contact Card** window appears.
2. Press F5 to open the **Contact List** window and select from the list a contact that is assigned to you.
3. Click Functions, Show Outlook Item. The Outlook Contact card window appears.

You can follow the same procedure to view an Outlook contact that corresponds to a Navision contact assigned to another salesperson, that is provided it has already been synchronized with your Outlook.

If the contact has not been synchronized with your Outlook, or it was synchronized with your Outlook and the corresponding Outlook item was deleted in the process, the following message appears:



Click Yes if you want the program to synchronize this contact with Outlook and display the corresponding Outlook Contact card.

To view another salesperson's contact that has not been synchronized with your Outlook, do the following:

1 Click Relationship Management, Contacts. The **Contact Card** window appears.

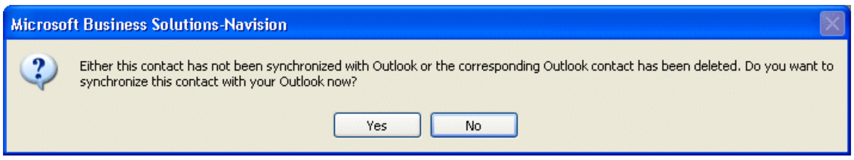
2 Press F5 to open the **Contact List** window and select from the list a contact that is assigned to another salesperson and has not yet been synchronized with your Outlook.

3 Click Functions, Show Outlook Item. If you have permission to access this Salesperson Outlook contacts folder, the following message appears:

4 Select one of the options and click OK.

If you select the first option, *Show contact in PS's Outlook*, the program will retrieve the contact from Outlook that is assigned to this salesperson and display the corresponding Outlook Contact card.

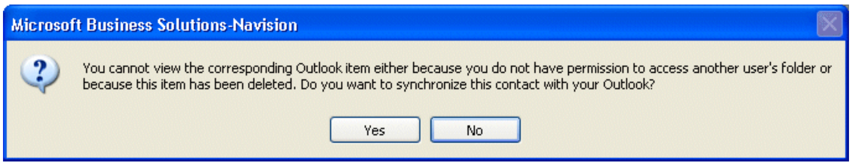
If the contact has not been synchronized with the Outlook salesperson it is assigned to, the following message appears:



Click Yes if you want the program to create this contact in your Outlook and display the corresponding Outlook Contact card.

If you select the second option, *Create contact in my Outlook*, the program will create this contact in your Outlook and display the corresponding Outlook Contact card.

If you have chosen to view the contact that has been synchronized with another salesperson's Outlook and then deleted, or you have no permission to access this salesperson's corresponding contacts folder, the following message appears:



Click Yes if you want the program to create this contact in your Outlook and display the corresponding Outlook Contact card.

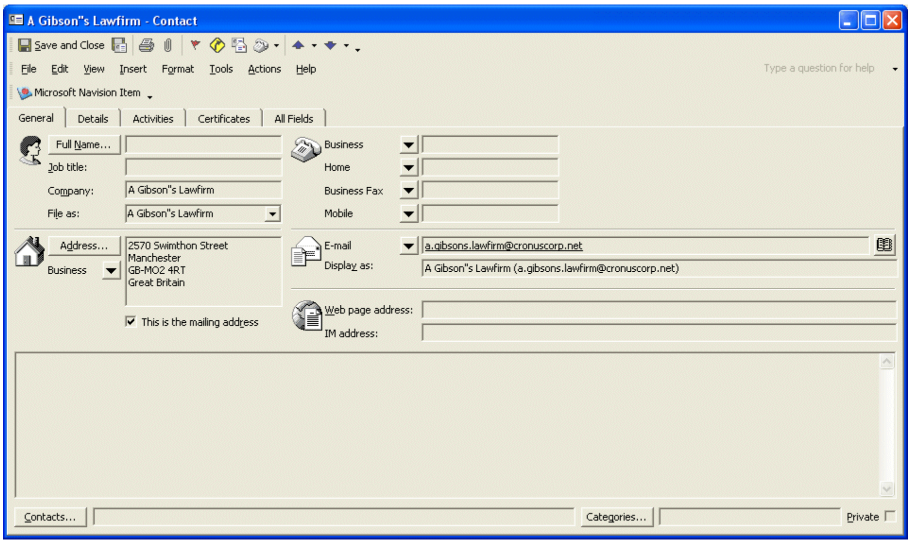
Viewing Navision Contacts from Outlook

You can view Navision contacts synchronized with Outlook contacts from Outlook.

To view a Navision contact, do the following:

1 In the **Contacts** folder, select a contact. The **Contact Card** window appears.

2 If the contact has been synchronized with Navision, you will see the **Navision Contact** toolbar button.



If the contact has not been synchronized, the **Navision Contact** toolbar will be disabled.

Click the Navision Contact button on the Navision toolbar to open the corresponding Navision contact card.

3 The Navision **Contact Card** window appears. If the Navision application has not yet been started, it will be opened automatically.

You may have to go through the common procedure of opening Navision synchronized with Outlook.

The corresponding Navision contact card will be displayed.

If a Navision contact has been synchronized with Outlook and then deleted, the program will display a message informing you that the corresponding Navision item does not exist. After clicking OK, the Navision **Contact Card** window appears displaying the first contact in the contact list.

8.4 INTEGRATING TO-DOS

You can also integrate to-dos in Navision with appointments and tasks in Outlook. This saves you time because you do not have to go through a similar procedure twice. Previously, for example, you created a to-do of the Meeting type in Navision and in order to have this event in your Outlook calendar you had to duplicate it in Outlook. Now, if you create a to-do in Navision, it will appear immediately in the corresponding Outlook folder and vice versa, if you create an appointment or task in Outlook, it will appear in Navision as well.

To be able to do this, first you have to set up the feature and enter all the necessary information you will need.

Later when you create a to-do of the Meeting type in Navision, an appointment will be created in Outlook. If you create a to-do of the Phone Call type or do not specify the type, a task will automatically be created in Outlook.

This functionality works when you are creating a to-do from the **Salesperson Card**, **Contact Card**, **Campaign Card**, and **Segment Card**.

Team to-dos are not reflected in Outlook.

Note

To-dos that have already been closed are not synchronized with Outlook.

To integrate a Navision to-do with Outlook, do the following:

1. Click Relationship Management, Salespeople, Salesperson, To-dos. The **To-do List** window appears.
2. Click Create To-do. The **Create To-do** wizard appears.
3. Follow the instructions in the wizard and enter the relevant information.
4. Click Finish to complete the to-do. A new to-do is now created in Navision and a corresponding appointment or task is created in Outlook.

Your Outlook settings determine whether you will receive a reminder or not. Usually you will receive an Outlook reminder about an appointment that was to take place in the past. You will receive a reminder about a future appointment. You will not receive a reminder about a task unless the Reminder check box in the **Task** window in Outlook is selected.

In case a to-do of the Meeting type is created using the Assign Activities function, it is created in Outlook as an All Day Event. You can manually adjust the start time and duration of the to-do later.

When you close a to-do of the Blank or Phone Call type in Navision, the program closes the corresponding Outlook task. However, if you close a to-do of the Meeting type, the corresponding Outlook calendar item stays open because you cannot close a calendar item in Outlook.

If you cancel a to-do in Navision, the program will delete the corresponding Outlook item and send a notification message to your Outlook Inbox stating that this to-do has been canceled in Navision and the corresponding Outlook item has been deleted. The message also contains the number, the starting date and the subject of the to-do.

Due to the different ways Navision and Outlook treat recurrence, full synchronization of the recurring items between Navision and Outlook is not possible. But one-way synchronization of recurring tasks/calendar items and to-dos is supported. This means that a task, a calendar item or a to-do should only be set to recurring in one of the two applications – either in Outlook or Navision. Then, when the task or to-do is closed and the new one is created in one application, the same occurs in the other application. However, when you restore one of the closed tasks in Outlook, a new to-do is created in Navision. If you reopen a closed to-do in Navision, a new item will be created in Outlook.

If you close a task in Outlook that has already been synchronized with Navision and then reopen this task, the program will also open the corresponding to-do in Navision.

Note

If you change a to-do of the *Meeting* type when synchronization with Outlook is disabled, then, the next time you run the **Synchronize with Outlook** batch job, the program will overwrite the meeting attendees information in Navision with the Outlook data. The contents of all other fields on the Outlook task card, such as Subject, Due Date, Start Date, and so on, will be overwritten with the new information you have entered on the to-do card in Navision

When you accept a task that has been assigned or reassigned to you in Outlook, the accepted task is put in the default Outlook Tasks folder. Therefore, if you are using a Tasks folder which is not a default folder, the accepted tasks will not be synchronized with Navision. If you want accepted tasks to be synchronized with Navision, we recommend that you use only default Outlook folders for synchronization of tasks with Navision.

Importing and Exporting To-dos

As an alternative to synchronizing your data where you integrate all your contact, calendar and to-do data between Navision and Outlook, you can choose to import to-dos from Outlook to Navision or to export to-dos from Navision to Outlook

By choosing one of these two processes, you can set filters for your synchronization to specify which data you want to be synchronized.

Importing To-dos from Outlook

To import Outlook tasks and calendar items into Navision, follow this procedure:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Import from Outlook.

2 Click Import To-dos from Outlook. Confirm the subsequent message.

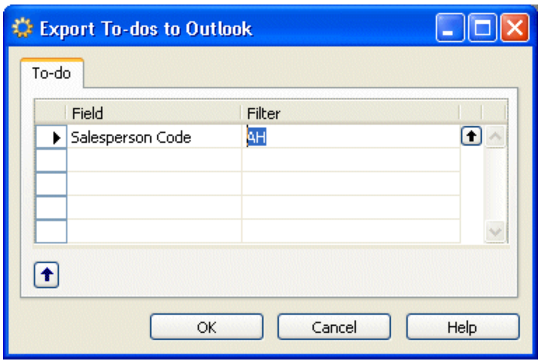
Outlook tasks that have already been closed are not transferred to Navision.

Exporting To-dos to Outlook

To export to-dos to Outlook, do the following:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Export to Outlook.

2 Click Export To-dos to Outlook. The Export To-dos to Outlook batch job request window appears:



3 Set a filter to define which Navision to-dos you want to be synchronized with Outlook tasks and calendar items. You can set additional fields by clicking the Field field and then clicking the AssistButton to the right of the field and selecting from the list.

4 Click OK to start exporting to-dos to Outlook.

Note

Only to-dos belonging to the current salesperson will be exported to Outlook. If you change the salesperson's code in this field or leave it empty, the program will ignore this and export to Outlook only the to-dos belonging to the current salesperson.

Viewing Outlook Calendar Items and Tasks from Navision

From Navision you can view Outlook calendar items and tasks that correspond to Navision to-dos. You can do so from the **To-do Card** or **To-do List** window.

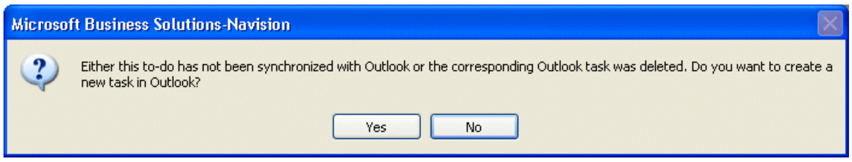
To view an Outlook calendar item or task that corresponds to a Navision to-do assigned to you, do the following:

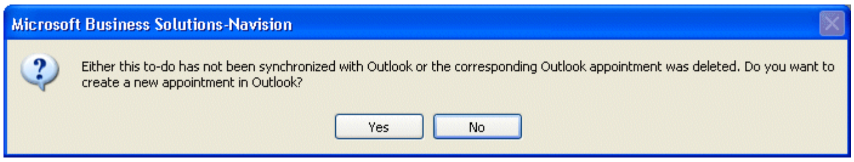
1 Click Relationship Management, Salespeople.

2 On your salesperson card, click Salesperson, To-dos.

3 In the **To-do List** window, choose a to-do and click Functions, Show Outlook Item. If the to-do has been synchronized with Outlook and the corresponding Outlook item has not been deleted, the program will display the corresponding Outlook item card.

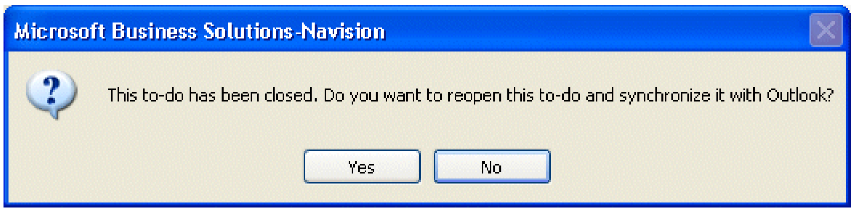
4 If this to-do is open and it has not been synchronized with Outlook, or the respective Outlook item was deleted, the program will display a message asking you whether you want to synchronize this to-do with Outlook. Depending on whether the to-do is of the *Meeting* type or *Blank* or *Phone Call* type, one of the following messages will be displayed:





Click Yes if you want the program to synchronize this to-do with Outlook and display the corresponding Outlook item card.

5 If the to-do is closed and it has not been synchronized with Outlook and/or has been canceled, then a message will be displayed informing you that this to-do has been closed and asking you whether you want to reopen this to-do and synchronize it with Outlook.



Click Yes if you want the program to synchronize this to-do with Outlook and display the corresponding Outlook item card.

You can also view Outlook calendar items and tasks that belong to other salespeople within your company.

To view an Outlook calendar item that is assigned to another salesperson, do the following:

1 Click Relationship Management, Salespeople.

2 On the salesperson card, select the salesperson whose Outlook calendar item you want to see and then click Salesperson, To-dos.

3 In the To-do List window, select a to-do and click Functions, Show Outlook Item. The corresponding Outlook item card appears.

To view an Outlook item corresponding to a to-do assigned to another salesperson, you must have permission to access this salesperson's Outlook folder. If you do not have such permission or the corresponding Outlook item has been deleted from this salesperson's Outlook or has not been synchronized with Outlook at all, a message will appear informing you that you cannot view this Outlook item.

Note

You cannot view Outlook items that correspond to team to-dos because team to-dos are not synchronized with Outlook.

Viewing Navision To-dos from Outlook

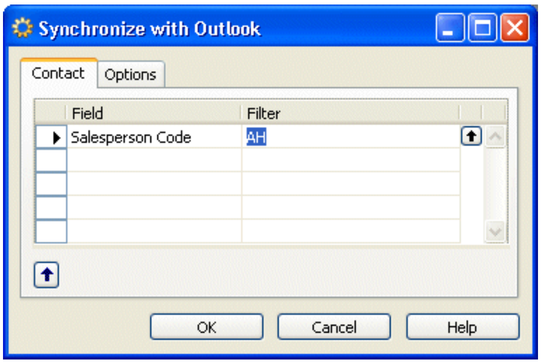
You can view Navision to-dos synchronized with Outlook calendar items and tasks from Outlook. To do so, follow the same procedure as for viewing Navision contacts from Outlook.

8.5 SYNCHRONIZING DATA

You can start the **Synchronize with Outlook** batch job to both import and export data simultaneously. This is useful when you start using the Outlook Integration feature.

To start synchronizing, follow this procedure:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Synchronize with Outlook. The **Synchronize with Outlook** batch job request window appears:



2 On the **Contact** tab, set a filter to define which Navision contacts and to-dos linked to these contacts you want to be synchronized with Outlook items. You can set additional fields by clicking the **Field** field, and then clicking the AssistButton to the right of the field and selecting from the list.

3 If you want the program to synchronize only the contacts belonging to the current salesperson when running the Synchronize with Outlook batch job, on the **Options** tab, select the check box in the **Synchronize Only Contacts** field. In this case the program will skip exporting the current salesperson's to-dos to Outlook when you run the **Synchronize with Outlook** batch job.

4 If you want the program to synchronize only the to-dos that match a certain period when running the **Synchronize with Outlook** batch job, on the **Options** tab, enter the dates for the period in the **Period Start** and **Period End** fields.

Note

The program will use the dates for this particular batch job only. Next time you open the **Synchronize with Outlook** batch job request window, the program will fill in the **Period Start** and **Period End** fields with the dates calculated using the date formulas set on the **Synchronization** tab of the **Salesperson/Purchaser** card.

---

5 Click OK to start synchronization with Outlook.

We recommend that, once you have started the **Synchronize with Outlook** batch job, you do not click Cancel on the progress indicator. If you click Cancel, the synchronization process will be stopped abruptly and you will be unable to retrieve the data as it existed before you started this batch job.

To avoid erroneous synchronization of the contacts from Outlook to Navision, you should store business and private contacts in separate folders. The same applies to private tasks and appointments. Private items should also be marked private in Outlook to ensure that they do not appear in Navision.

We recommend that you set up different folders for contacts from different companies.

Changing Another Salesperson's Records in Outlook

When the other salesperson edits your contact or to-do in Navision, your corresponding Outlook item will be updated accordingly.

Outlook checks if you have set up permissions for this salesperson to modify your records in the corresponding Outlook folder:

- If you have granted this permission, the change will be synchronized with your corresponding Outlook item.

  You can set up Navision to automatically send e-mail notifications about such changes to your Outlook Inbox. To do so, select the check boxes in the corresponding fields on the **Notification** tab in the **Salesperson/Purchaser Card** window.

- If the other user has no permission to edit your Outlook items, the change will only be saved in Navision. Then, after you run the **Synchronize with Outlook** batch job, it will be synchronized with the corresponding Outlook item.

To edit the other salesperson's contact in Navision and Outlook and to notify him about this change, do the following:

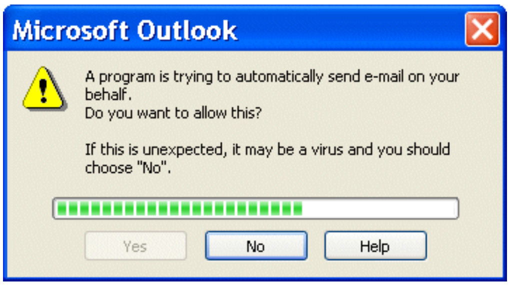
1 Click Relationship Management, Salespeople, Salesperson, Contacts.

2 In the **Contact List** window, select the contact you want to edit, click Contact, Card. The **Contact Card** window for the contact you have selected appears.

3 In the **Contact Card** window, make the necessary changes to the records, and then close the window.

A message may appear asking you to allow access to your Outlook mailbox for external applications. Allow access for the time you need and click Yes.

4 The following Outlook message appears:



Click Yes to send a notification to the salesperson whose contact you have changed.

To edit the other salesperson's to-do in Navision and Outlook and notify him/her about this change, follow the similar procedure:

1 Click Relationship Management, Salespeople, Salesperson, To-dos.

2 In the **To-do List** window, select the to-do you want to edit and click To-do, Card. The **To-do Card** window for the to-do you have selected appears.

3 In the **To-do Card** window, make the necessary changes and close the window.

4 Follow steps 2 and 3 of the procedure for editing another salesperson's contacts in Navision and Outlook.

Synchronizing Contacts Assigned to Another Salesperson

If you need to synchronize contacts that belong to another salesperson, for example when two or more salespersons are working on the same task or project, you use the **Export Contacts to Outlook** or **Synchronize with Outlook** batch jobs. The same result can be achieved by changing the contact's salesperson to the one you are currently working with and then, when you have finished working, changing it back again. Once the contact appears in Outlook, it will be updated automatically even if belongs to another salesperson. However, if you have deleted this contact from Outlook and then modify the corresponding contact in Navision, it will not be created again in Outlook.

Deleting All Items in Outlook Tasks Folder

When you delete all items or the last item from the Tasks folder in Outlook, the corresponding to-dos in Navision are canceled and closed.

If both applications – Navision and Outlook – are running, and synchronization with Outlook is enabled for the current salesperson, the corresponding to-dos in Navision are canceled and closed automatically.

If Navision is not running, after deleting all items, start Navision and run the **Synchronize with Outlook** batch job.

To check the results, do the following:

1 Click Relationship Management, Salespeople, Salesperson, List, and choose the appropriate salesperson.

2 On the Salesperson Card, click Salesperson, To-dos, and make sure that all corresponding to-dos are canceled and closed.

Canceling To-dos with Deleted Outlook Items

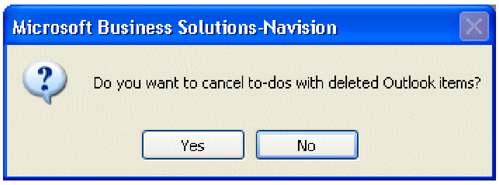
If you delete a task or calendar item in Outlook when Navision is not running, it still remains unchanged in Navision until the next synchronization. Then, if you do not run the **Synchronize with Outlook** batch job when you start Navision, you can run the **Cancel To-dos with Deleted Outlook Items** batch job to cancel Navision to-dos that correspond to Outlook items which have been deleted.

When both applications – Navision and Outlook – are running, if you delete an item in Outlook, the program will automatically close and cancel the corresponding to-do in Navision.

To cancel to-dos with deleted Outlook items, do the following:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Cancel To-dos with Deleted Outlook Items.

2 Confirm the subsequent message.

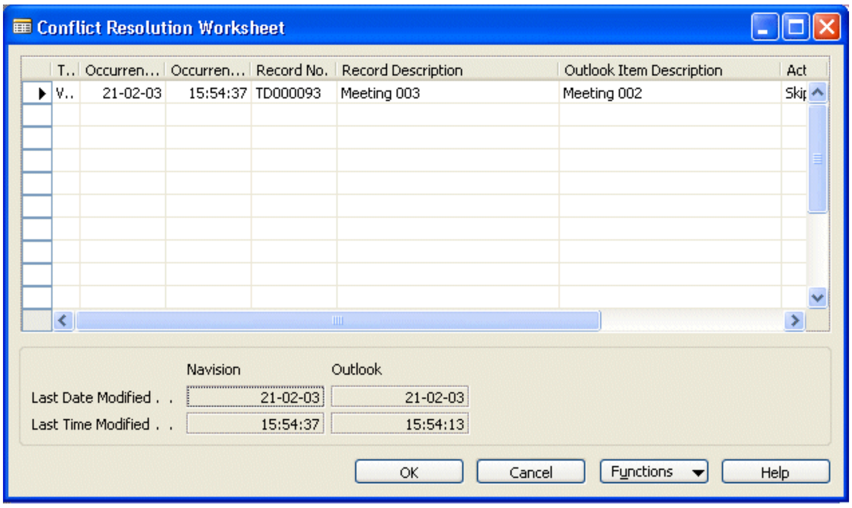


8.6 CONFLICT RESOLUTION AND ERROR HANDLING

When integrating Navision records and Outlook items, the program compares certain fields and maps. If you change the text in any of these fields, the program automatically synchronizes the two documents and updates the information in them. This occurs when both Navision and Outlook are running. But if you change the text in the mapped fields in Navision while Outlook is not running (or vice versa), the program does not know which data has priority and a conflict will occur. You can view Outlook integration conflicts in the **Conflict Resolution Worksheet** window.

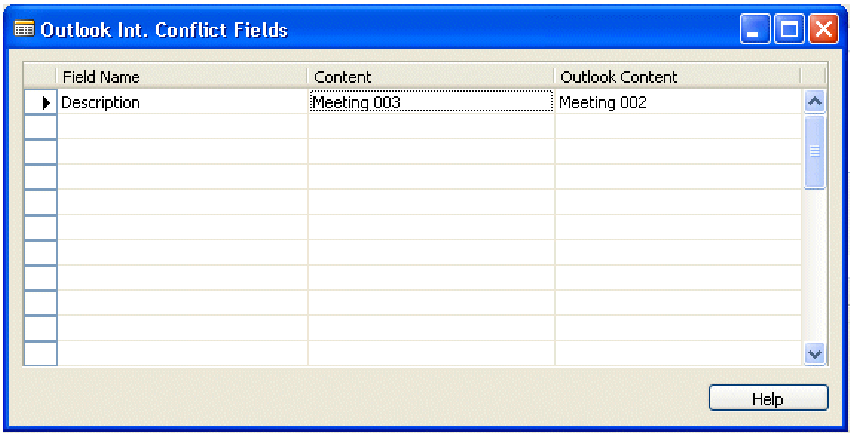
To resolve Outlook integration conflicts, follow this procedure:

1 Click Relationship Management, Periodic Activities, Outlook Integration, Outlook Integration Logs, Conflict Resolution Worksheet. The **Conflict Resolution Worksheet** window appears:



2 Select the conflict you want to resolve and choose what you want to do with it by clicking the AssistButton to the right of the **Action** field. Then select from the list: *Skip*, *Delete*, *Replace Navision Record* or *Replace Outlook Item*.

You can view the names and contents of the conflicting fields by clicking the AssistButton button to the right of the **No. of Conflicting Fields** field. The **Outlook Int. Conflict Fields** window appears.

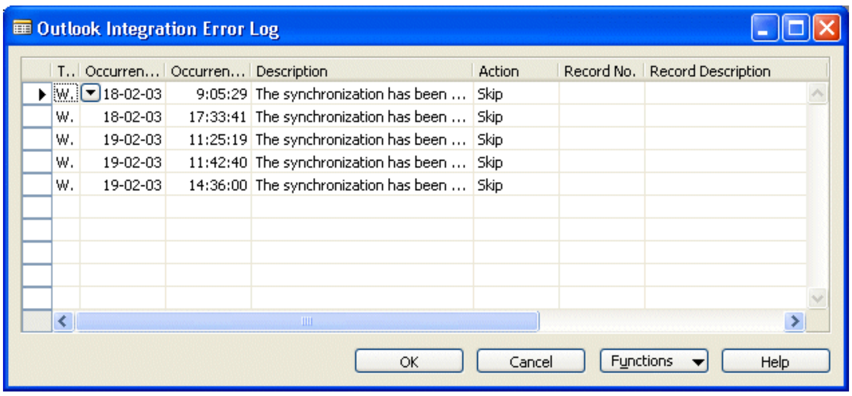


3 Click OK. The program will perform the action you have selected in the **Action** field.

The program will report an error when something interrupts the Outlook integration working process, for example, a failure to connect to Outlook.

You can view Outlook integration errors in the **Outlook Integration Error Log** window by clicking Relationship Management, Periodic Activities, Outlook Integration, Outlook Integration Logs, Error Log. You can also perform certain actions with the log errors by clicking the AssistButton to the right of the **Action** field and selecting from the list: *Skip* or *Delete*. The program will perform the action you have selected after you click OK.

The **Outlook Integration Error Log** window looks like this:



8.7 EXERCISES

Exercise 24 **Integrating a Contact**

You are Annette Hill, a salesperson at Cronus International Ltd. You work with both Navision and Outlook.

You are going to create a new contact in Navision and want to have this contact in Outlook as well.

Create a contact using the following information:

Name: *RSyn Ltd.*

Address: *17 Forest Street*

AU-2000 Sydney, NSW

Australia

After you have created the contact in Navision, check that it has been created in Outlook as well.

Exercise 25 **Integrating a To-do**

You are going to organize a meeting concerning the planning of the Millennium campaign. You want to create a new to-do in Navision and to store it in Outlook as well.

Create a to-do using the following information:

Type: *Meeting*

Description: *Millennium Campaign Planning*

Duration: *1 hour*

Attendees: *Debra L. Core, Peter Saddow, and Richard Lum*

When the to-do is created in Navision, view the corresponding Outlook item card.

Exercise 26 **Synchonizing To-dos Within a Specified Period**

You are going to synchronize your Navision contacts and to-dos with the corresponding Outlook items, but you are interested in the changes made during a two-week period only, starting one week before today (February 19, 2003) and ending one week after today's date.

1 On the Synchronization tab of the Salesperson/Purchaser card, set up the synchronization period covering one week before today and one week after today's date.

2 You realize that you need more time to prepare for the *Millennium Campaign Planning* meeting. You decide to postpone the meeting for more than a week, until February 28. Update the corresponding to-do.

3 Before the meeting, you decide to identify key persons for the Millennium campaign. Create a new to-do for today's date, involving contact CT000026 *Lovaina Contractors*.

4 If the time for which you allowed access to Outlook has expired, run the Synchronize with Outlook batch job. Then check what changes appeared in your Outlook tasks and calendar folders.

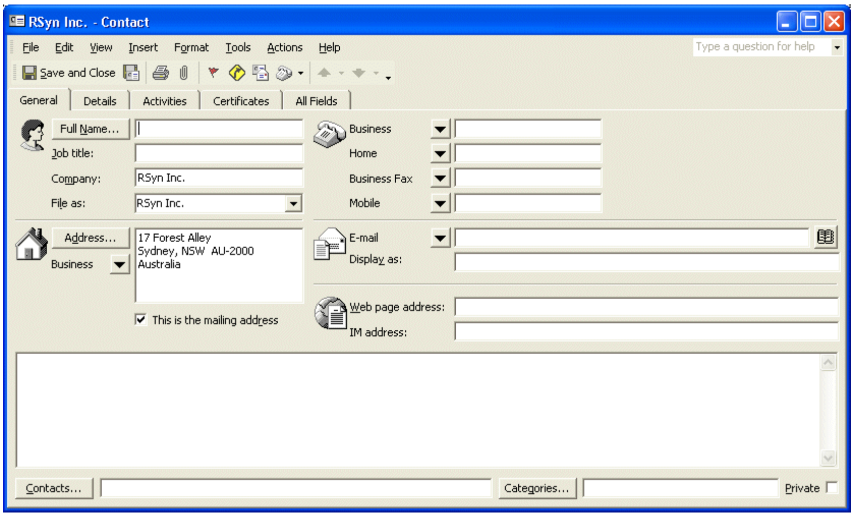
Solutions

Exercise 24

1 First you have to set up Outlook Integration parameters on the **Outlook Integration** tab of Annette Hill's salesperson card. Set up Outlook folders that you will need for integration.

2 Create a contact in Navision entering all the information you have and close the Contact Card.

3 Find this contact in the corresponding contact's folder in Outlook.



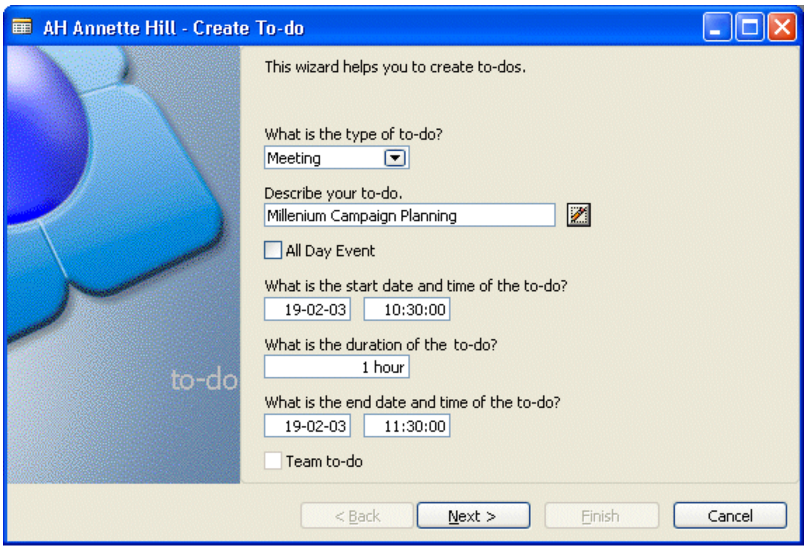
Exercise 25

1 Click Relationship Management, Salespeople.

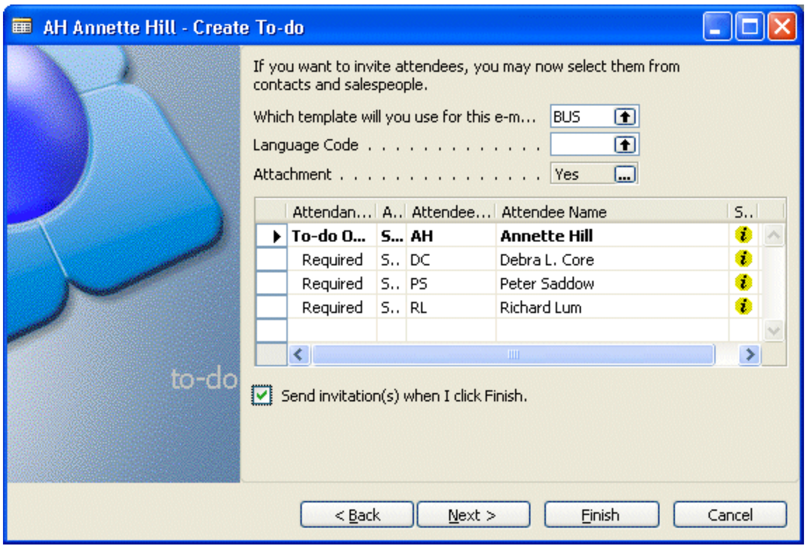
2 On the Salesperson card, select Annette Hill, and then click Salesperson, To-dos.

3 In the **To-do List** window, click Create To-do. The **Create To-do** wizard appears.

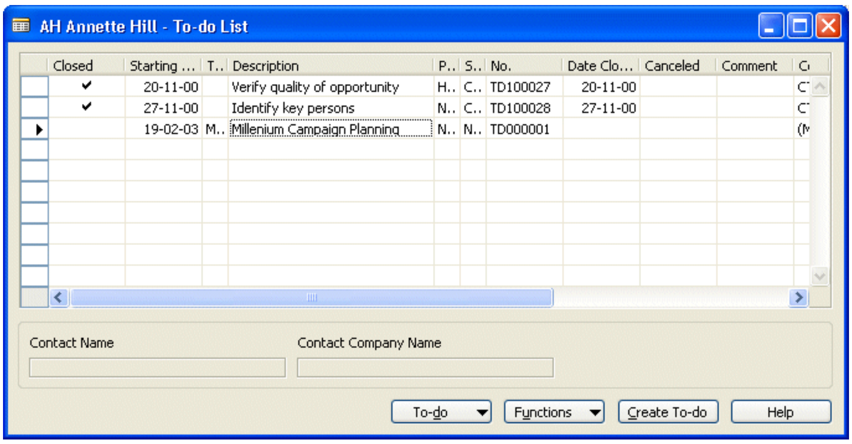
4 Fill in the mandatory fields and any optional fields on the first page of the wizard with the relevant information. When you have completed the page, the first wizard page should look like this:



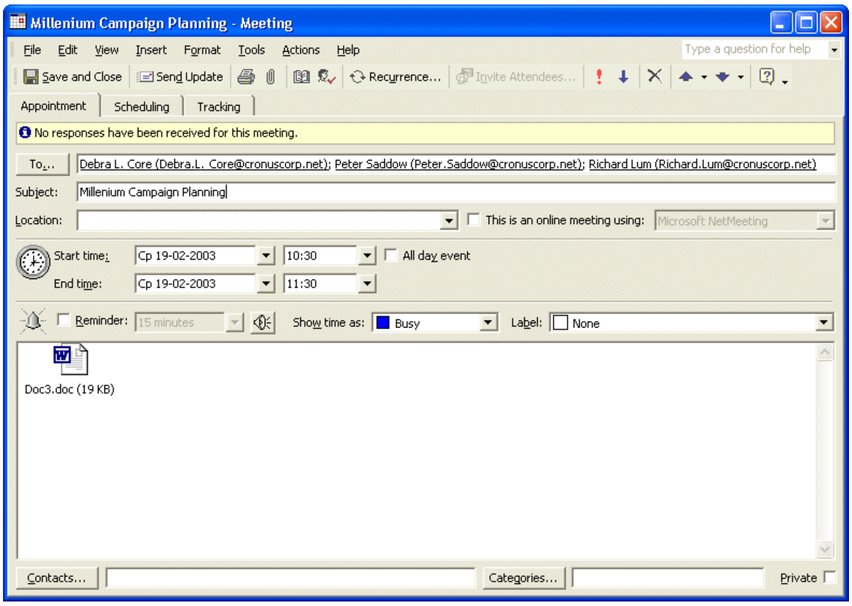
5 Fill in the mandatory fields and any optional fields on the second page of the wizard with the relevant information. When completed, it should look like this:



6 When you have completed the **Create To-do** wizard, the to-do appears in your **To-do List** window.



7 Select this to-do and click Functions, Show Outlook Item. The corresponding Outlook calendar item card appears.



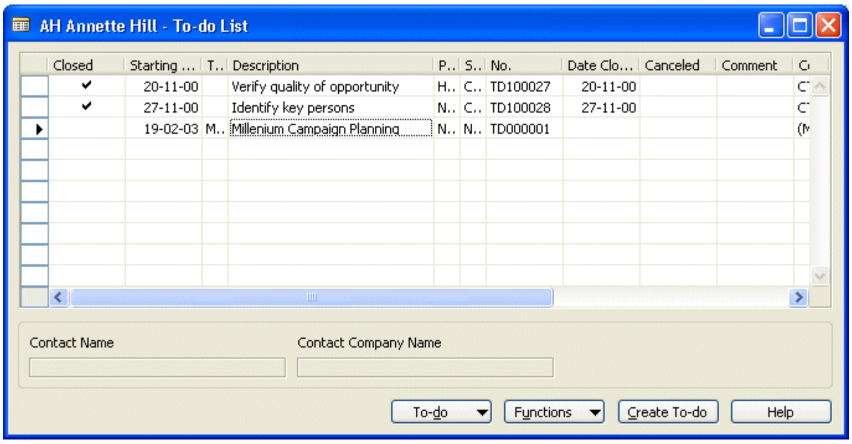
Exercise 26

1 Click Relationship Management, Salespeople.

2 On the salesperson card, select Annette Hill. On Annette Hill's salesperson card, go to the **Synchronization** tab. Select the *Time Period* in the **Synchronize To-dos** option field, then specify the synchronization period by entering the date formulas: *-1W* in the **Synchronize From** field and *1W* in the **Synchronize To** field.

3 On Annette Hill's salesperson card, click Salesperson, To-dos.

4 In the **To-do List** window, select the *Millennium Campaign Planning* meeting.



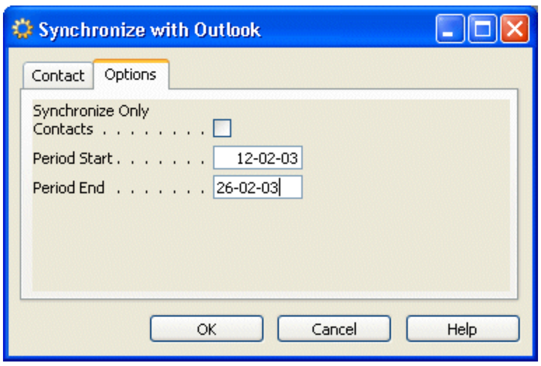
5 Open the selected **To-do Card** window by clicking To-do, Card.

6 Edit this to-do and close the card.

7 In the **To-do List** window, click Create To-do. The **Create To-do** wizard appears. Create a to-do using the following information:

Type:	*Blank*
Description:	*Identify key persons*
Starting Date:	*Today (February 19, 2003)*
Contact:	*CT000026 Lovaina Contractors.*

8 On Annette Hill's salesperson card, click Functions, Synchronize with Outlook. In the **Synchronize with Outlook** batch job window, on the **Options** tab, you can make sure that the dates in the **Period Start** and **Period End** fields correspond to the period you have set on the **Synchronization** tab of Annette Hill's salesperson card.



9 Click OK to start the **Synchronize with Outlook** batch job.

10 In Outlook, make sure that one new to-do, *Identify key persons*, appeared in your Outlook tasks folder, and no new items appeared in your calendar folder.

Chapter 9

Opportunity Management

This chapter contains the following sections:

- Introduction to Opportunity Management
- Setting Up Opportunities
- Creating Opportunities
- Updating Opportunities
- Creating To-dos for Opportunities
- Creating Sales Quotes and Orders for Opportunities
- Closing and Deleting Opportunities
- Statistics
- Exercises

9.1 INTRODUCTION TO OPPORTUNITY MANAGEMENT

Opportunities in the program refer to sales opportunities. You use opportunities to keep track of potential sales.

Sales Cycles

Before you can start using opportunity management, you must set up sales cycles and sales cycle stages. A sales cycle is made up of a series of stages that go from the initial contact to the closing of a sale. You can set up as many sales cycles as you need, and you can set up as many sales cycle stages as necessary within a sales cycle.

Opportunities

All opportunities must be associated with a salesperson and a contact. They can also be associated with a campaign.

You create opportunities using the **Create Opportunities** wizard. You provide information about the contact, salesperson, sales cycle and dates, as well as your estimates for the sales value of the opportunity and your estimation of the chances of its success.

Once you have set up an opportunity, it remains inactive until you activate it with the **Update Opportunity** wizard. Activating an opportunity moves it into the first sales cycle stage. You can use the wizard with an opportunity as many times as necessary, to change dates, estimated values or chances of success, and to move the opportunity to prior or later sales cycle stages and to skip stages, if necessary.

Once an opportunity gets to the appropriate stage, you can set up a sales quote and sales order directly from the Relationship Management application area.

9.2 SETTING UP OPPORTUNITIES

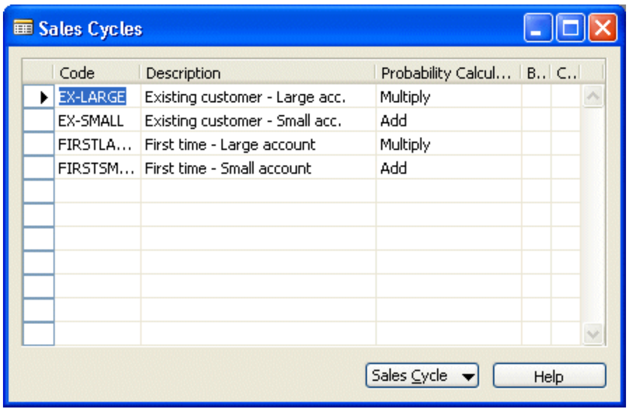
There are a number of setup tasks you must perform before you can begin to use opportunities. You must set up your sales cycles and sales cycle stages, close opportunity codes, default sales cycle code and default virtual customer number.

Setting Up Sales Cycles

You use sales cycles to manage your sales opportunities. You set up separate sales cycles for each group of your contacts (for example, an industry group or a segment) whose members follow the same sales cycle. Once you have set up the sales cycles you can set up the stages within each cycle.

To set up a sales cycle, follow this procedure:

1 Click Relationship Management, Setup, Opportunity, Sales Cycles. The **Sales Cycles** window appears:



2 Press F3 to enter a new sales cycle.

3 Fill in the Code, Description and Probability Calculation fields.

The probability calculation is based on the **Chances of Success (%)** and/or the **Completed (%)** fields on the opportunity card. There are four options you can select in the **Probability Calculation** field: Multiply, Add, Chances of Success % or Completed %. If you select *Chances of Success (%)* or *Completed (%)*, the probability percentage is copied from the corresponding field on the opportunity card. If you select *Multiply*, the probability percentage is calculated by multiplying the contents of the two fields. If you select *Add*, the probability percentage is calculated by adding the contents of the two fields.

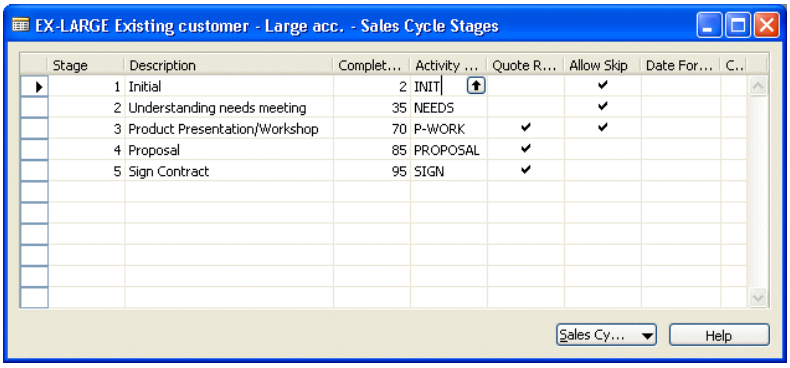
4 Repeat steps 2 and 3 to set up as many sales cycles as you want.

Setting Up Sales Cycle Stages

Now you can set up the sales cycle stages for each sales cycle. Follow this procedure:

1 Click Relationship Management, Setup, Opportunity, Sales Cycles.

2 Find the sales cycle for which you want to set up stages, and click Sales Cycle, Stages. The **Sales Cycle Stages** window appears:



3 Press F3 to enter a new stage in the sales cycle.

4 Fill in the **Stage** and **Description** fields, with the number and description of the stage.

5 In the **Completed %** field, enter the percentage of the sales cycle that has been completed when the opportunity reaches this stage.

6 In the **Activity Code** field, enter the code for the activity associated with the stage.

7 Place a check mark in the **Quote Required** field if a quote is required at this stage before the opportunity can move to the next stage in the sales cycle.

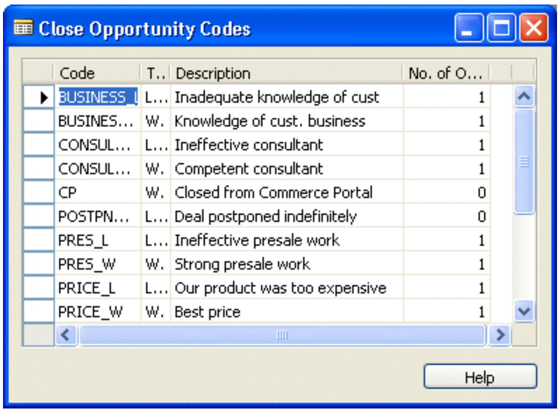
8 Place a check mark in the **Allow Skip** field to allow the opportunity to skip this stage and move on to the next stage.

9 Repeat steps 3 to 8 to set up as many stages as you want within the sales cycle.

Setting Up Close Opportunity Codes

You use close opportunity codes to indicate the reason an opportunity was closed. This can be used for statistics and analysis of sales strategies. Follow this procedure:

1 Click Relationship Management, Setup, Opportunity, Close Opportunity Codes. The **Close Opportunity Codes** window appears:



2 Press F3 to enter a new close opportunity code.

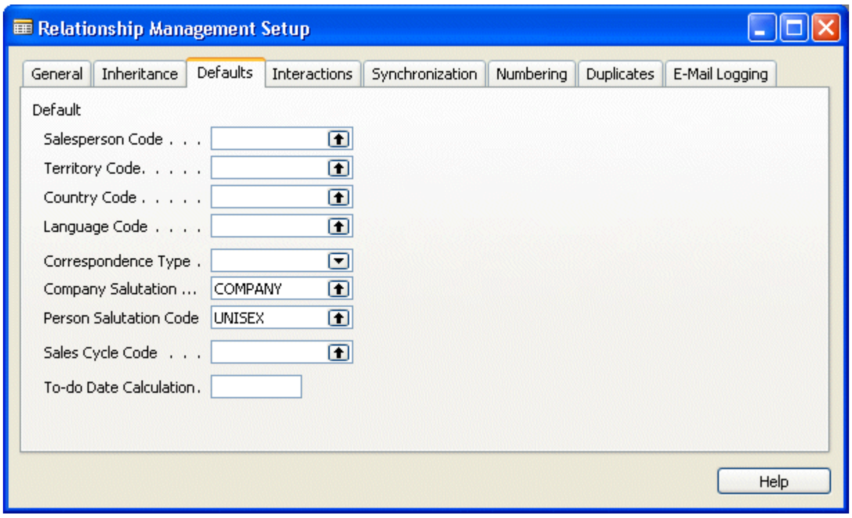
3 Fill in the **Code**, **Description** and **Type** fields.

4 Repeat steps 2 and 3 to set up as many close opportunity codes as you want.

Setting Up the Default Sales Cycle Code

It is possible that you have only one sales cycle, or that you have several sales cycles but one of them applies to most of your opportunities. You can set up a default sales cycle code that the program assigns to opportunities when they are created. Follow this procedure:

1 Click Relationship Management, Setup, Relationship Mgt. Setup. The **Relationship Management Setup** window appears.



2 On the **Defaults** tab, in the **Sales Cycle Code** field, click the AssistButton and select the sales cycle that you want to use as the default sales cycle.

9.3 CREATING OPPORTUNITIES

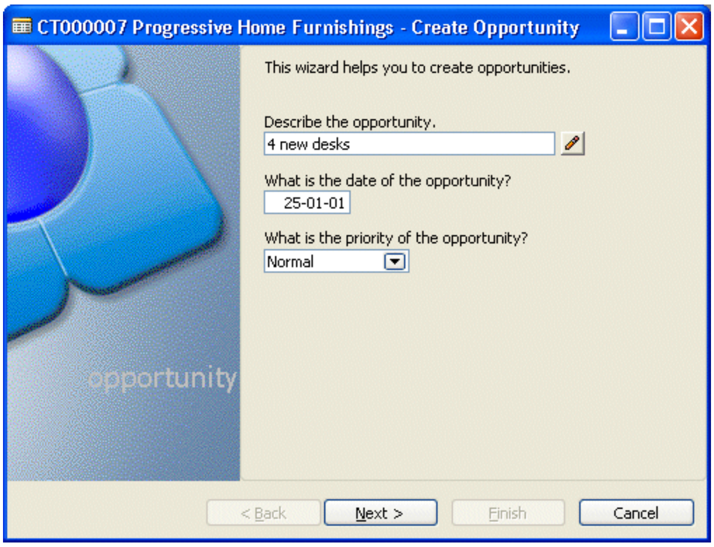
You can create opportunities for the potential sales you have with your contacts. All opportunities must be assigned to a salesperson/purchaser and must involve a contact.

You can create opportunities from the **Opportunity List** window. Depending on where you access the **Opportunity List** window from, the window shows opportunities for either contacts, campaigns or salespeople. The following procedure shows how to create opportunities from the contact card.

1 Click Relationship Management, Contacts.

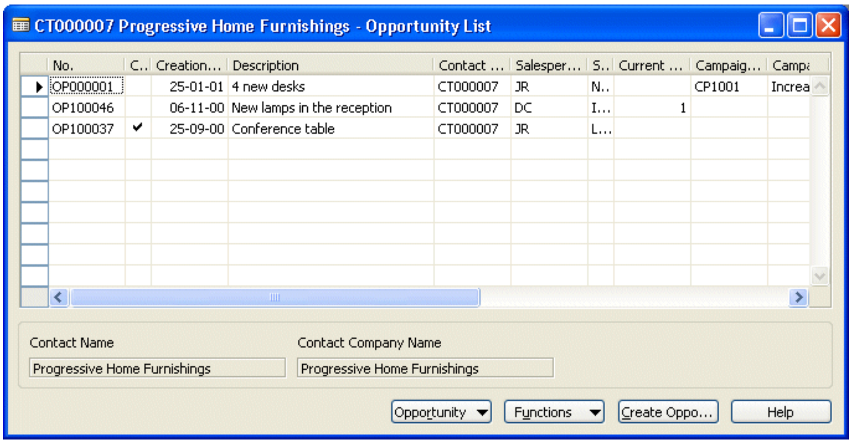
2 Find the contact involved in the opportunity and click Contact, Opportunities.

3 In the **Opportunity List** window, click Create Opportunity. The **Create Opportunity** wizard appears:



4 Fill in all the mandatory and any relevant optional fields of the wizard before clicking Finish.

Now the opportunity appears in the **Opportunity List** window for the contact (and for the salesperson):

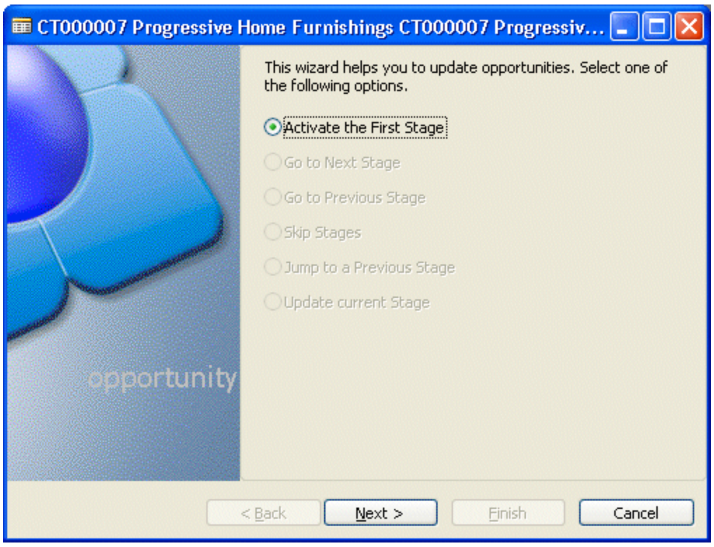


When you have created an opportunity, you can activate the first sales cycle stage.

Activating an Opportunity

An opportunity is inactive until you activate it. You do this with the **Update Opportunity** wizard. Follow this procedure:

1 In the **Opportunity List** window, select the opportunity you want to activate and click Functions, Update. The **Update Opportunity** wizard appears:



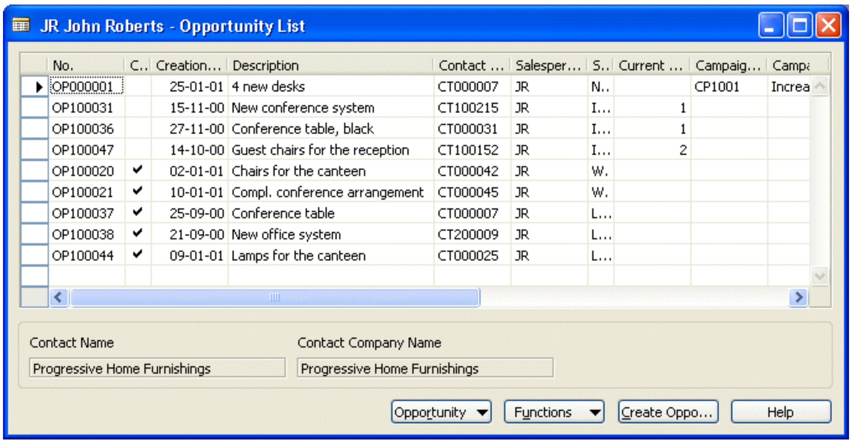
2 Fill in all the mandatory and any relevant optional fields of the wizard before clicking Finish.

Viewing Opportunities

Once you have created one or several opportunities, you can view the opportunities in either the **Opportunity List** window or the individual opportunity card for each of your opportunities.

The Opportunity List Window

You can open the **Opportunity List** window from the salesperson card, the campaign card and the contact card. The window displays different information depending on where you open it from. For example, if you open the **Opportunity List** window from a salesperson card, the window displays all the opportunities created by that salesperson:

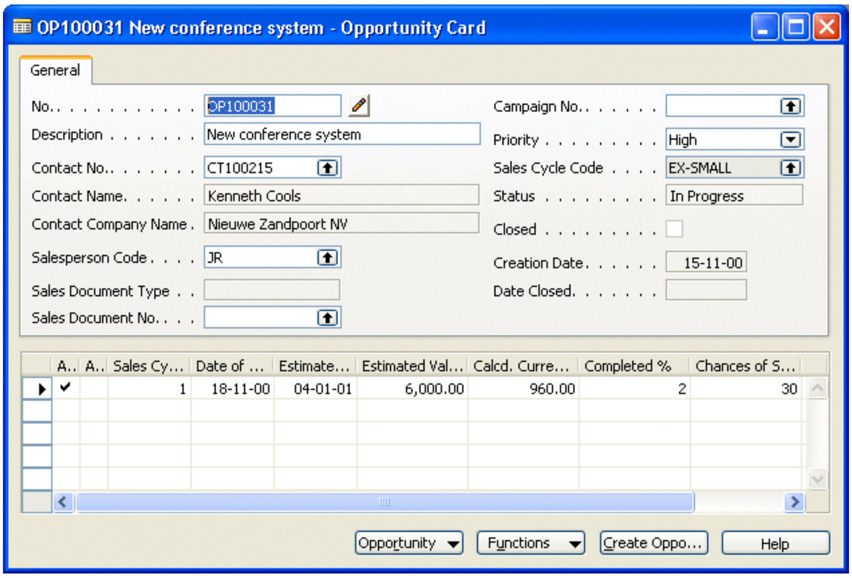


Closed opportunities appear at the end of the list.

The program automatically inserts a new line when you create an opportunity using the **Create Opportunity** wizard. You can do this by clicking Create Opportunity.

The Opportunity Card

From the **Opportunity List** window, you can open the opportunity card for an opportunity. On the opportunity card you can see detailed information about a specific opportunity:



The opportunity card is composed of two parts, a header and lines.

The header contains general information about the opportunity, such as a description of the opportunity, the sales cycle that it is linked to, the contact for the opportunity, and so on.

The lines contain the different entries made by the program when you update or close the opportunity.

In this window, you can create new opportunities by pressing F3 or clicking Create Opportunity.

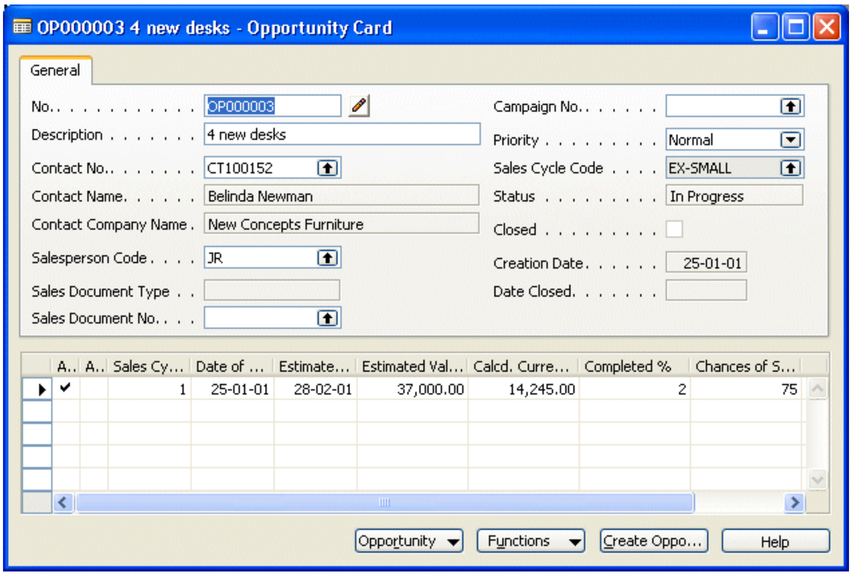
Exercise

Belinda Newman at New Concepts Furniture is interested in buying some new desk systems.

Create and activate an opportunity from the opportunity card for John Roberts involving this new contact.

Solution

When you have created the opportunity and activated it, the opportunity card should look something like this:


OP000003 4 new desks - Opportunity Card
General
No. OP000003
Description 4 new desks
Contact No. CT100152
Contact Name Belinda Newman
Contact Company Name New Concepts Furniture
Salesperson Code JR
Sales Document Type
Sales Document No.
Campaign No.
Priority Normal
Sales Cycle Code EX-SMALL
Status In Progress
Closed
Creation Date 25-01-01
Date Closed
A.. A.. Sales Cy... Date of ... Estimate... Estimated Val... Calcd. Curre... Completed % Chances of S...
1 25-01-01 28-02-01 37,000.00 14,245.00 2 75
Opportunity
Functions
Create Oppo...
Help

9.4 UPDATING OPPORTUNITIES

You update opportunities, for example, to modify your evaluation of their chances of success and estimated values, or to move them to a new sales cycle stage.

There may be situations where you need to move an opportunity back to a previous stage in the sales cycle, for example, if you have moved them to the next stage too soon, or if a stage needs to be repeated or you can skip to a stage ahead, for example, if they move faster than what is expected in the model they follow. You can do all of this with the **Update Opportunities** wizard.

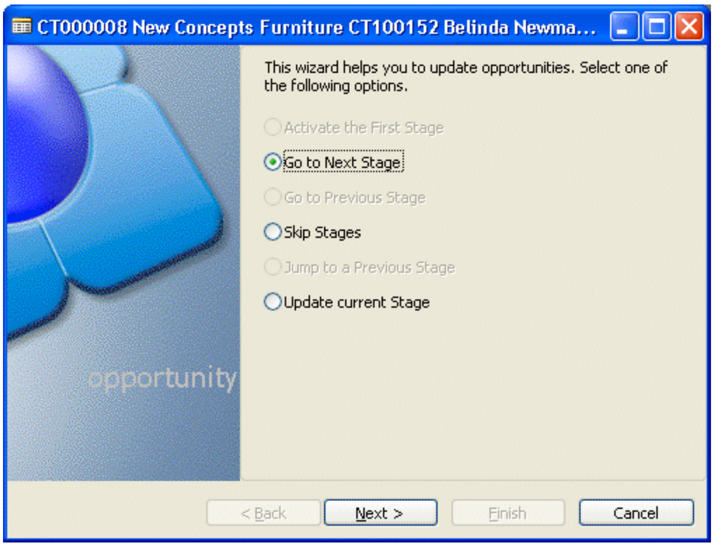
Using the Update Opportunity Wizard

You update opportunities from the **Opportunity List** window. The following procedure shows how to update opportunities from the contact card.

1 Click Relationship Management, Contact.

2 Find the contact related to the opportunity and click Contact, Opportunities.

3 In the **Opportunity List** window, click Function, Update. The **Update Opportunity** wizard appears.



4 In the first window of the wizard, select the relevant option and then click Next.

Note

Within a sales cycle, you can only skip stages for which you have selected the Allow Skip field in the Sales Cycle Stages window.

5 Fill in all the mandatory and any relevant optional fields of the wizard before clicking Finish.

9.5 Creating To-dos for Opportunities

You can create to-dos for opportunities. You create to-dos from the **To-do List** window for the relevant opportunity. The following procedure involves a campaign.

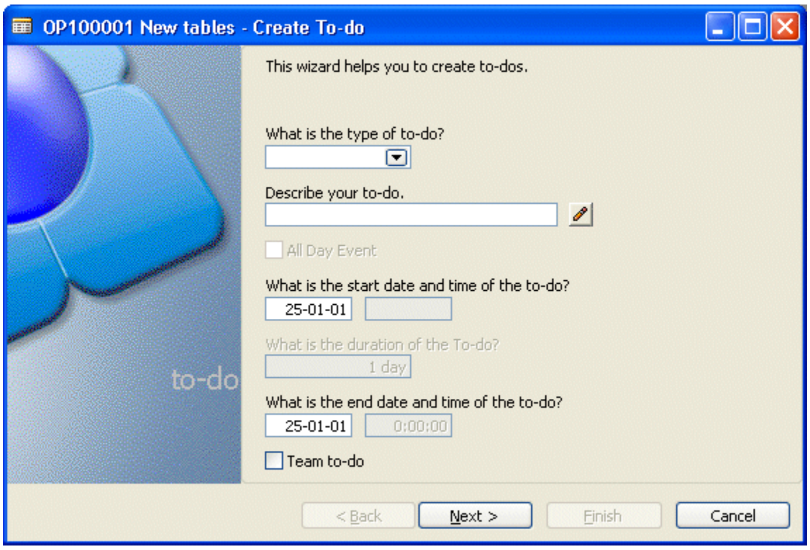
1 Click Relationship Management, Campaigns.

2 Select the relevant campaign and click Campaign, Opportunities.

3 Select the relevant opportunity in the **Opportunity List** window.

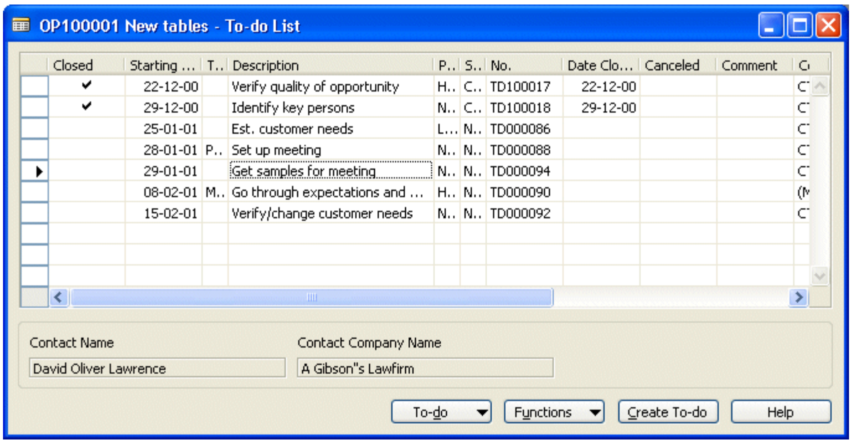
4 Click Opportunity, To-dos. The **To-do List** window for the opportunity appears.

5 In the **To-do List** window, click Create To-do. The **Create To-do** wizard appears:



6 Fill in all the mandatory and any relevant optional fields of the wizard before clicking Finish.

Now the to-do appears in the **To-do List** window for the opportunity:



Exercise

Create a to-do for the opportunity OP100031 starting from the salesperson/purchaser card for John Roberts.

9.6 CREATING SALES QUOTES AND ORDERS FOR OPPORTUNITIES

When handling sales opportunities, you may need to create a quote for the contact that the opportunity is linked to, and you may need to create an order from the quote.

Creating Sales Quotes for Opportunities

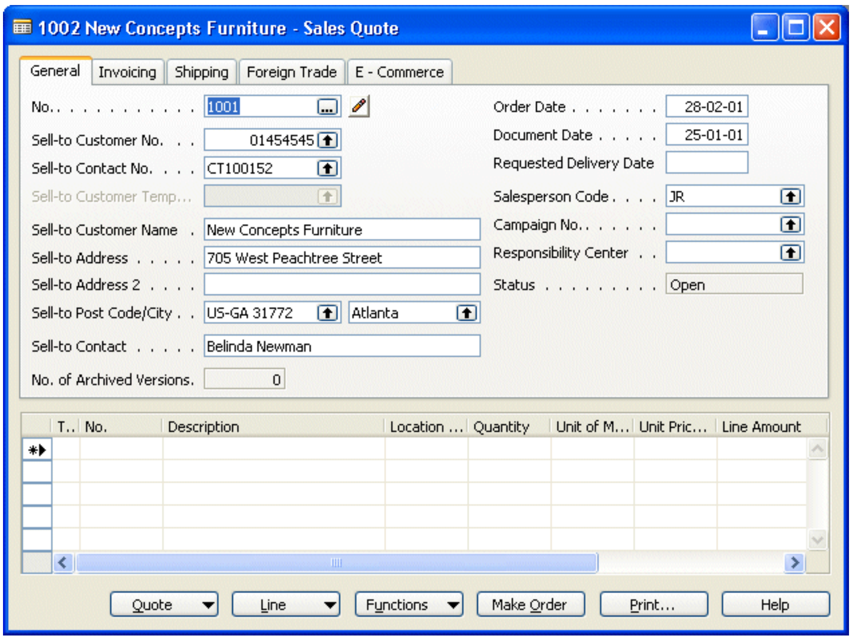
You can create quotes for opportunities from the **Opportunity List** window. The following procedure shows how to create sales quotes for opportunities from the contact card.

Follow this procedure:

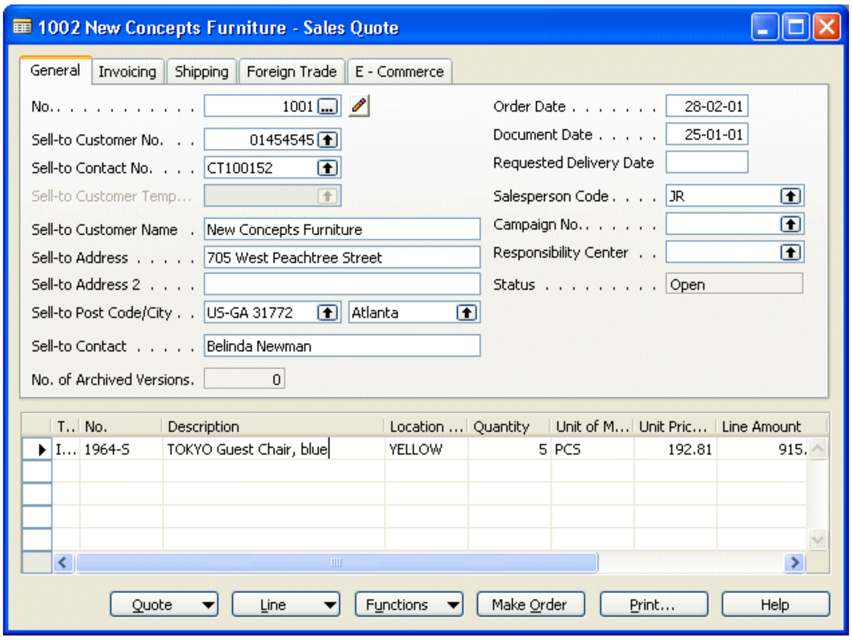
1 Click Relationship Management, Contacts.

2 On the contact card, select the contact for the opportunity and click Contact, Opportunities.

3 In the **Opportunity List** window, click Functions, Assign Sales Quote. The **Sales Quote** window appears:



4 Fill in the fields in the **Sales Quote** window:



Creating Sales Orders for Opportunities

You can make sales orders from the sales quotes that you have created for your opportunities.

Before you can do this, you must create the contact as a customer (see chapter 4, “Creating Customers, Vendors and Bank Accounts from Contacts”).

You can create sales orders for opportunities from the **Opportunity List** window. The following procedure shows how to create sales orders for opportunities from the salesperson/purchaser card.

Follow this procedure:

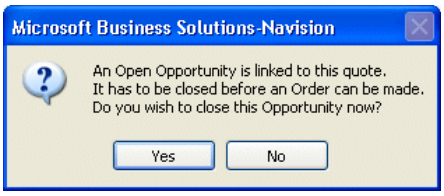
1 Click Relationship Management, Salespeople.

2 Browse to the relevant salesperson/purchaser card for the opportunity, and then click Salesperson, Opportunities. The **Opportunity List** window for that salesperson appears.

3 Select the opportunity that you have created a sales quote for, and then click Functions, Assign Sales Quote. The **Sales Quote** window appears, containing the sales quote that you have assigned to the opportunity.

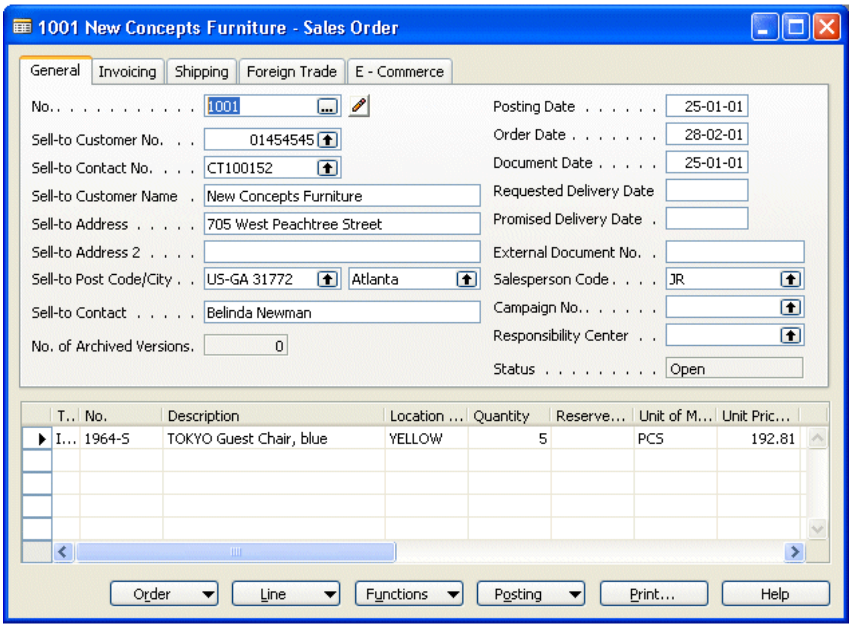
4 Enter any additional information in the **Sales Quote** window, and then click Make Order. A message appears asking you to confirm. The program automatically converts the quote into an order.

5 If you have not closed the opportunity, a message appears in which you must click Yes.



6 When you click Yes, the **Update Opportunity** wizard appears and you can close the opportunity (see section 8.7, Closing and Deleting Opportunities).

7 You can see the order you created by opening the relevant customer card and clicking Sales, Orders. The sales order that you created appears.



9.7 Closing and Deleting Opportunities

You can close opportunities when the negotiations are over. When closing an opportunity, you can specify the reasons for closing it. To do this, you must set up close opportunity codes.

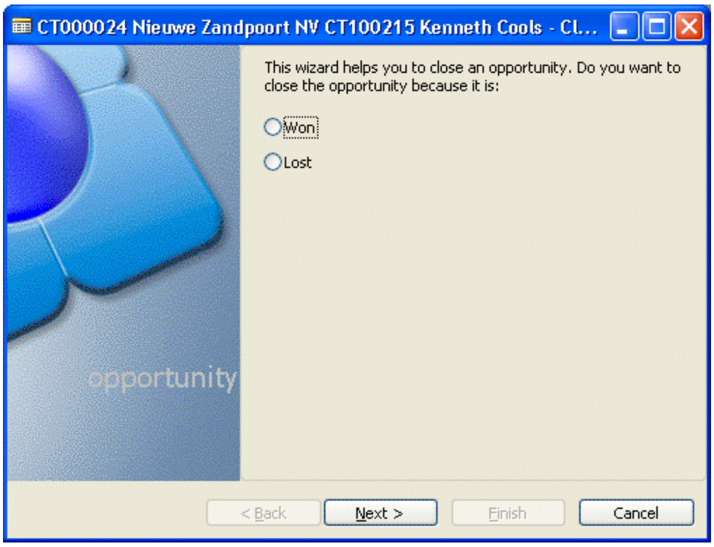
You can close opportunities from the **Opportunity List** window. The following procedure shows how to close opportunities from the contact card.

Follow this procedure:

1 Click Relationship Management, Contacts.

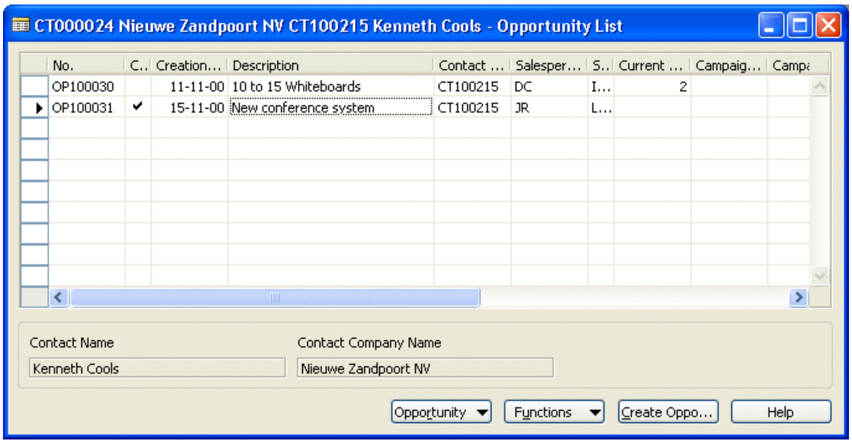
2 On the contact card, select the contact for the opportunity and click Contact, Opportunities.

3 In the **Opportunity List** window, click Functions, Close. The **Close Opportunity** wizard appears:



4 Fill in all the mandatory and any relevant optional fields of the wizard, before clicking Finish.

After you have closed the opportunity, the program places a check mark in the **Closed** field in the **Opportunity List** window and enters the relevant date in the **Date** field:



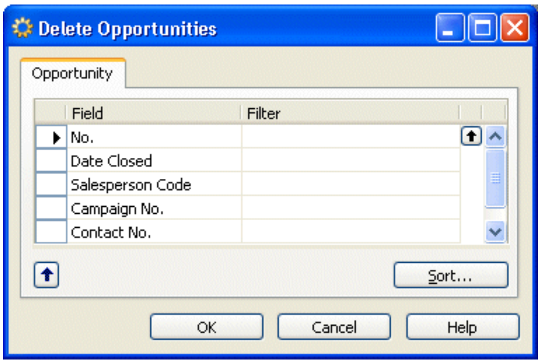
Closed opportunities can be deleted.

Deleting Opportunities

You can delete opportunities, for example, after you have concluded a deal or when the **Opportunity List** window is very full with many closed opportunities. Only closed opportunities can be deleted.

To delete closed opportunities, follow this procedure:

1 Click Relationship Management, Periodic Activities, Delete, Closed Opportunities. The **Delete Opportunities** window appears:



2 Select the **No.** field and in the **Filter** field, click the AssistButton to select the closed opportunities that you want to delete.

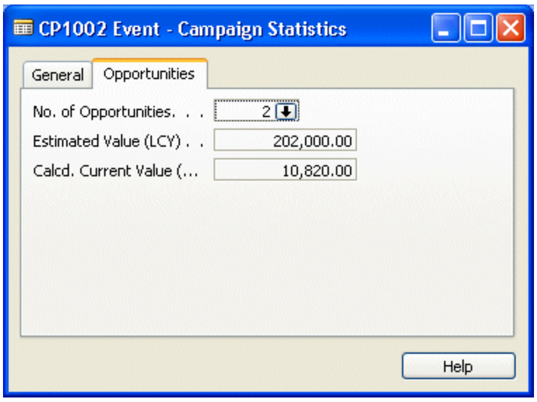
3 Click OK.

9.8 STATISTICS

You can view statistics about opportunities in a number of ways and from several different windows. There is an **Opportunities** tab in the **Contact Statistics**, **Salesperson Statistics** and **Campaign Statistics** windows, providing statistics about the opportunities for the individual contact, salesperson or campaign. There is also a statistics window for each individual sales cycle, sales cycle stage and opportunity. Finally, there is the **Opportunities** window, where you can choose the type of information to be displayed, the period you want to view, and the filters you want applied.

Contact, Campaign and Salesperson Statistics

The **Opportunities** tab in the **Contact Statistics**, **Salesperson Statistics** and **Campaign Statistics** windows displays the number of opportunities, the estimated value and the current value of all the opportunities for that contact, salesperson or campaign. To see statistics for contacts, salespeople or campaigns, browse to the relevant card, and click Contact, Salesperson or Campaign, and then click Statistics. The **Statistics** window appears:



Sales Cycle and Sales Cycle Stage Statistics

The **Sales Cycle Statistics** and **Sales Cycle Stage Statistics** windows display the number of opportunities, the estimated value and the current value of the opportunities for the sales cycle or sales cycle stage. The **Sales Cycle Stage Statistics** window divides the opportunities into active and inactive opportunities, and also reports the average number of days the opportunity entry was open.

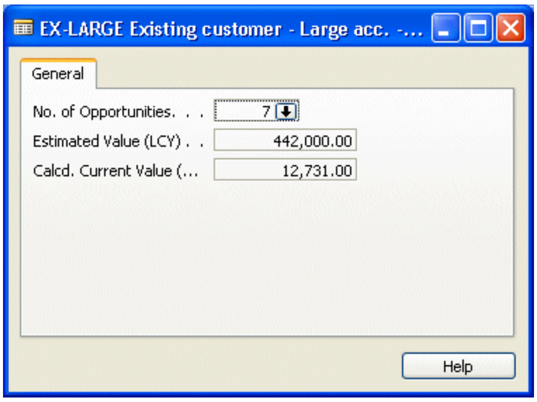
Sales Cycle Statistics

To view the **Sales Cycle Statistics** window, follow this procedure:

1 Click Relationship Management, Setup, Opportunity, Sales Cycles. The **Sales Cycles** window appears.

2 Select the sales cycle you want to see statistics for.

3 Click Sales Cycles, Statistics. The window looks like this:



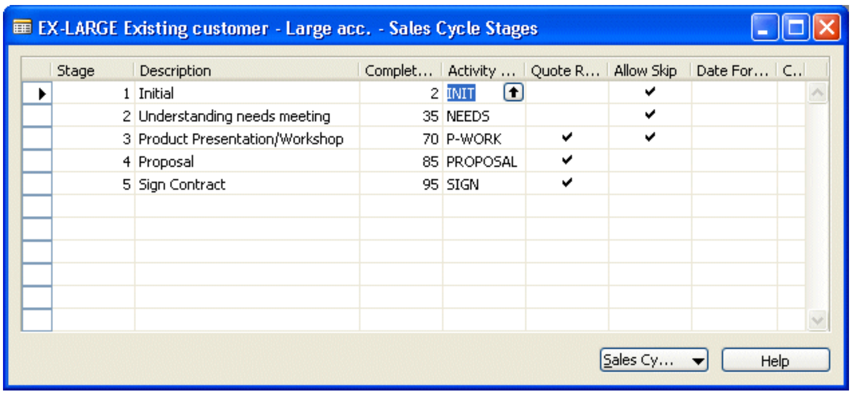
Sales Cycle Stage Statistics

To view the **Sales Cycle Stage Statistics** window, follow this procedure:

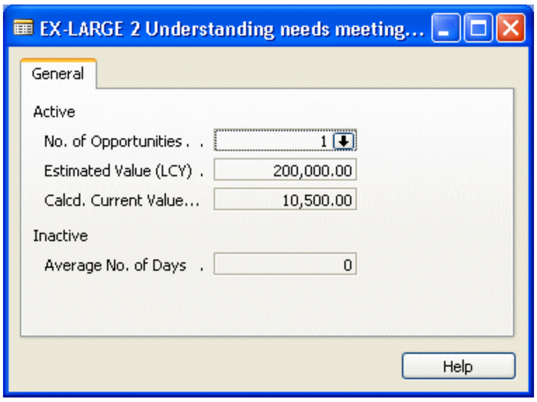
1 Click Relationship Management, Setup, Opportunity, Sales Cycles. The **Sales Cycles** window appears.

2 Select the sales cycle that contains the stage you want to see statistics for.

3 Click Sales Cycle, Stages. The **Sales Cycle Stages** window appears:



4 Select the relevant sales cycle stage and then click Sales Cycle Stage, Statistics. The **Sales Cycle Stage Statistics** window for that stage appears:



Opportunity Statistics

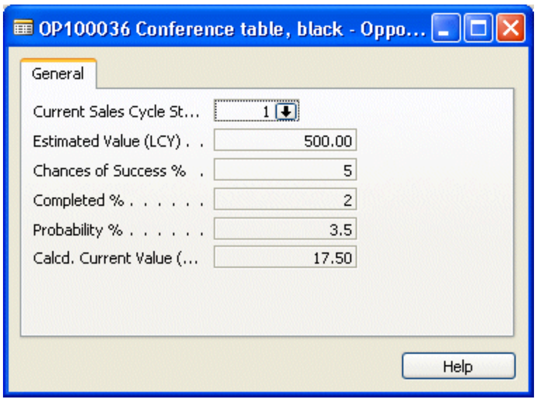
The **Opportunity Statistics** window provides information about an individual opportunity, such as the sales cycle stage, the current value, and the chances of success. You open the **Opportunity Statistics** window from the **Opportunity List** window. Depending on where you access the **Opportunity List** window from, the window shows opportunities for either contacts, campaigns or salespeople. The following procedure shows how to view opportunity statistics from the salesperson/purchaser card. Follow this procedure:

1 Click Relationship Management, Salespeople.

2 Find the salesperson card for the salesperson responsible for the opportunity.

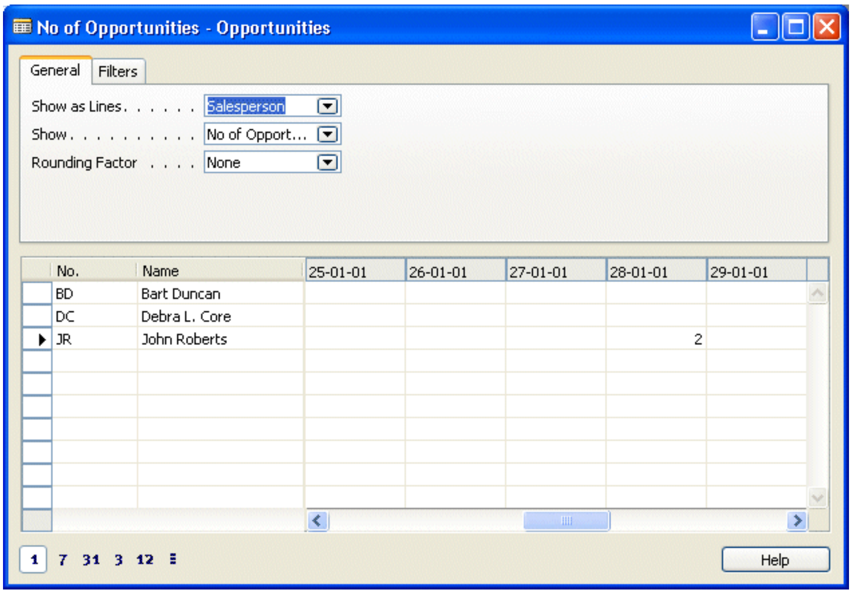
3 Click Salesperson, Opportunities. The **Opportunity List** window appears.

4 Select the relevant opportunity and click Opportunity, Statistics. The **Opportunity Statistics** window appears:



The Opportunities Window

In the Opportunities window, you can gain an overview of your opportunities. You open the window by clicking Relationship Management, Opportunities:



The window displays different information depending on the options you select on the **General** tab in the **Show as lines** and **Show** fields. You can, for example, have the program display the number of opportunities by campaign, or the estimated value of your opportunities by salesperson. On the **Filters** tab, you can set filters, for example, if you only want to include information about opportunities that are in a certain sales cycle. You select the time period in the lower left corner of the window.

Example

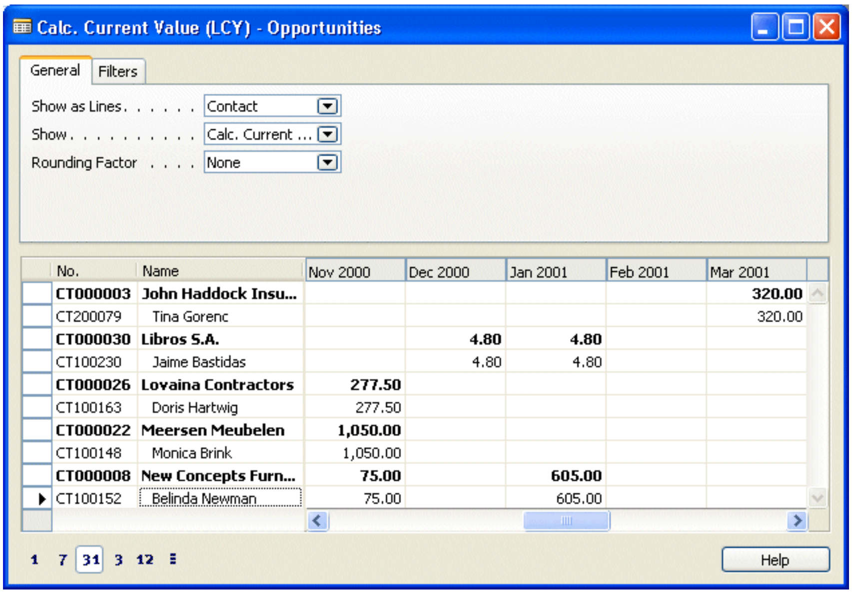
You want to see the current value of your opportunities in months from November 2000 to March 2001. Follow this procedure:

1 Click Relationship Management, Opportunities.

2 Click the **General** tab.

3 In the **Show as** lines field, select *Contact*.

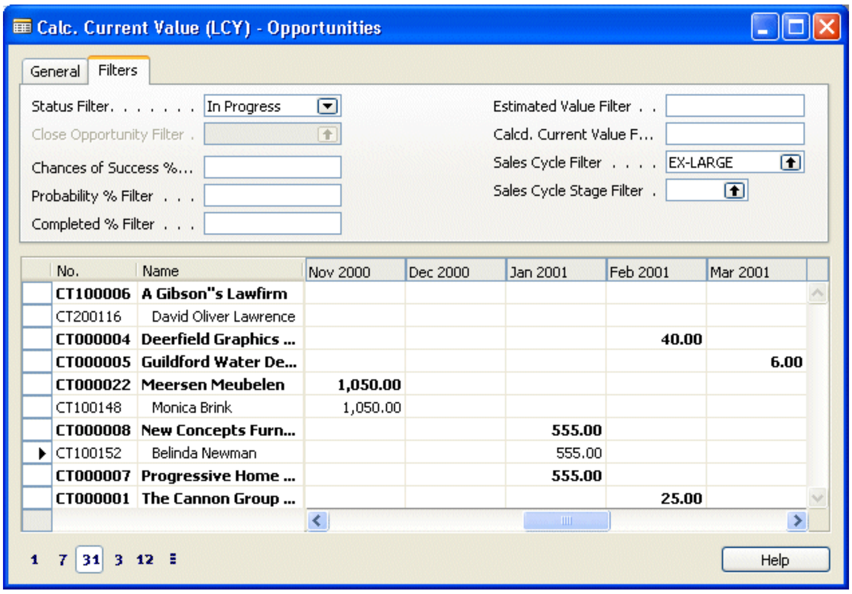
4 In the **Show** field, select *Cal. Current Value (LCY)*. The window should look something like this:



5 Click the **Filters** tab.

Now you decide to include only opportunities in the sales cycle EX-LARGE.

6 Click the **Filters** tab and in the **Sales Cycle Filter** field, click the AssistButton and select *EX-LARGE*. The window should now look something like this:


Calc. Current Value (LCY) - Opportunities
General
Filters
Status Filter. . . . . . .
In Progress
Close Opportunity Filter .
Chances of Success %...
Probability % Filter . . .
Completed % Filter . . .
Estimated Value Filter . .
Calcd. Current Value F...
Sales Cycle Filter . . . .
EX-LARGE
Sales Cycle Stage Filter .
No.
Name
Nov 2000
Dec 2000
Jan 2001
Feb 2001
Mar 2001
CT100006 A Gibson"s Lawfirm
CT200116 David Oliver Lawrence
CT000004 Deerfield Graphics ... 40.00
CT000005 Guildford Water De... 6.00
CT000022 Meersen Meubelen 1,050.00
CT100148 Monica Brink 1,050.00
CT000008 New Concepts Furn... 555.00
CT100152 Belinda Newman 555.00
CT000007 Progressive Home ... 555.00
CT000001 The Cannon Group ... 25.00
1 7 31 3 12
Help

9.9 EXERCISES

You are Debra L. Core, a sales assistant at Cronus. Your job is to help the salespeople with their tasks involving opportunity management.

Exercise 27 **Setting Up a Sales Cycle**

Set up a new sales cycle for medium-sized customers. Use chances of success for the probability calculation. Decide on your own sales cycle stages or use the following: Initial, Company Presentation, Understanding Needs, Proposal, Presentation/Workshop, Sign Contract. Allow at least one stage to be skipped and make at least one stage require a quote.

Exercise 28 **Activating Sales Stages**

You make a new contact regarding the Millennium series with a company called The Bicycle Warehouse.

1 Create a contact card for this new contact whose address is: 16 Cecil Street, GB-WD1 6YG Watford.

2 Create a new opportunity for the contact. Use the sales cycle you created for medium-sized customers.

3 Activate the first stage of your opportunity with The Bicycle Warehouse.

You hit it off well with your contact and are able to skip one stage.

4 Move the opportunity to the appropriate stage.

5 Open the statistics window for the opportunity. What are the estimated value and the current value of the opportunity?

Exercise 29 **Viewing Lost Opportunities**

Your opportunity has reached the stage where you must provide a quote.

1 Create the quote, look at the statistics for the contact and see what the estimated and current values are. Are there other opportunities included in the totals?

It looks like you have won the sale – the contact wants to place an order.

2 Set up the contact as a customer and create an order from the quote. Ignore any inventory warnings you may receive.

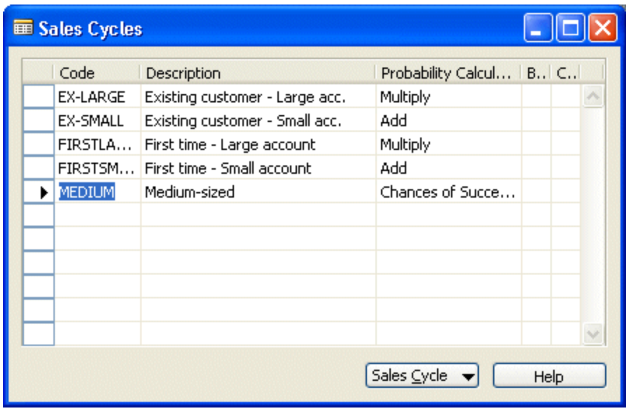
You want to see the number of lost opportunities by salesperson.

3 Use the **Opportunities** window to see this. How many opportunities have been won?

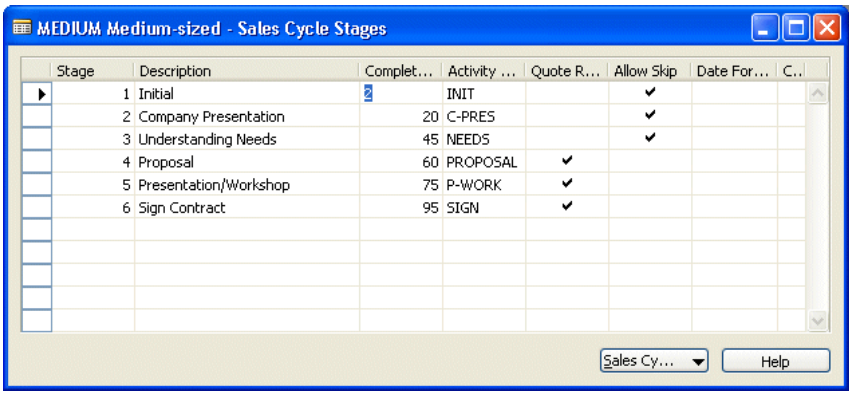
Solutions

Exercise 27

1 The **Sales Cycles** and **Sales Cycle Stages** windows should look like this:



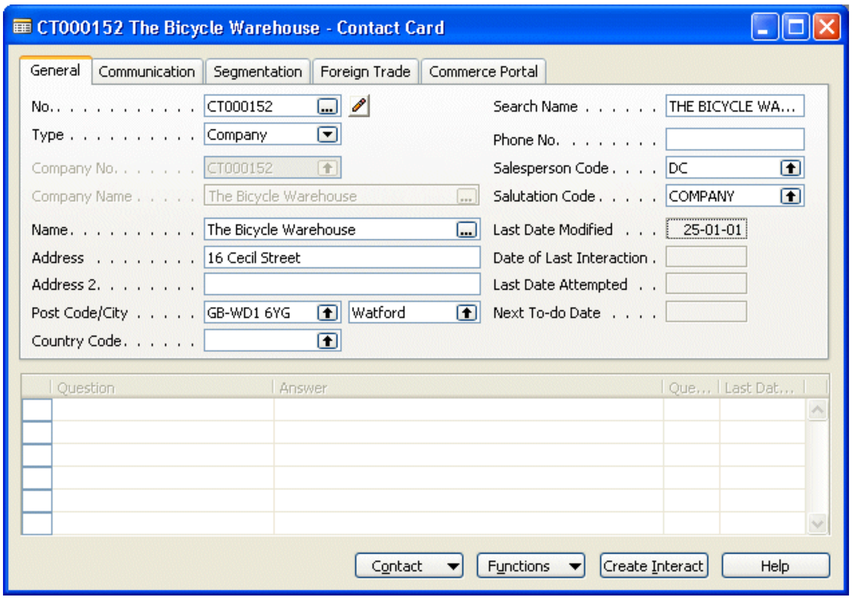
Code	Description	Probability Calcul...	B..	C..
EX-LARGE	Existing customer - Large acc.	Multiply		
EX-SMALL	Existing customer - Small acc.	Add		
FIRSTLA...	First time - Large account	Multiply		
FIRSTSM...	First time - Small account	Add		
MEDIUM	Medium-sized	Chances of Succe...		



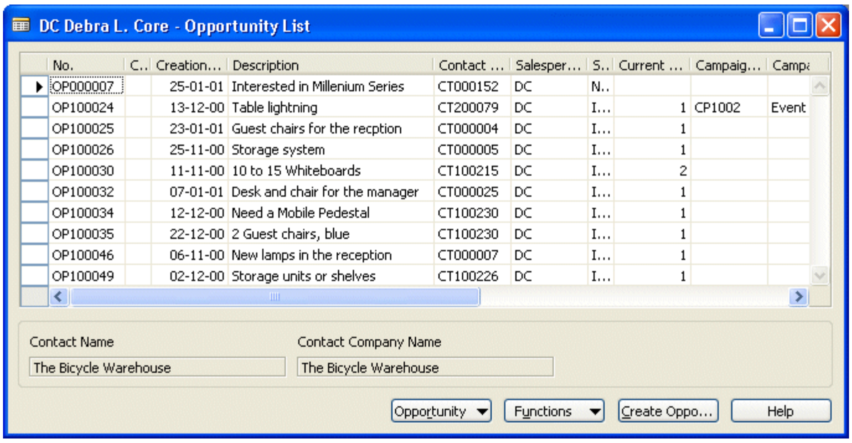
Stage	Description	Complet...	Activity ...	Quote R...	Allow Skip	Date For...	C..
1	Initial	2	INIT		✔		
2	Company Presentation	20	C-PRES		✔		
3	Understanding Needs	45	NEEDS		✔		
4	Proposal	60	PROPOSAL	✔			
5	Presentation/Workshop	75	P-WORK	✔			
6	Sign Contract	95	SIGN	✔			

Exercise 28

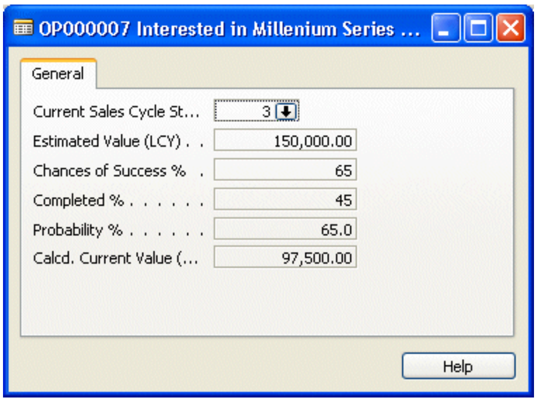
1 The contact card should look like this:



2 The **Opportunity List** window should include the new opportunity:

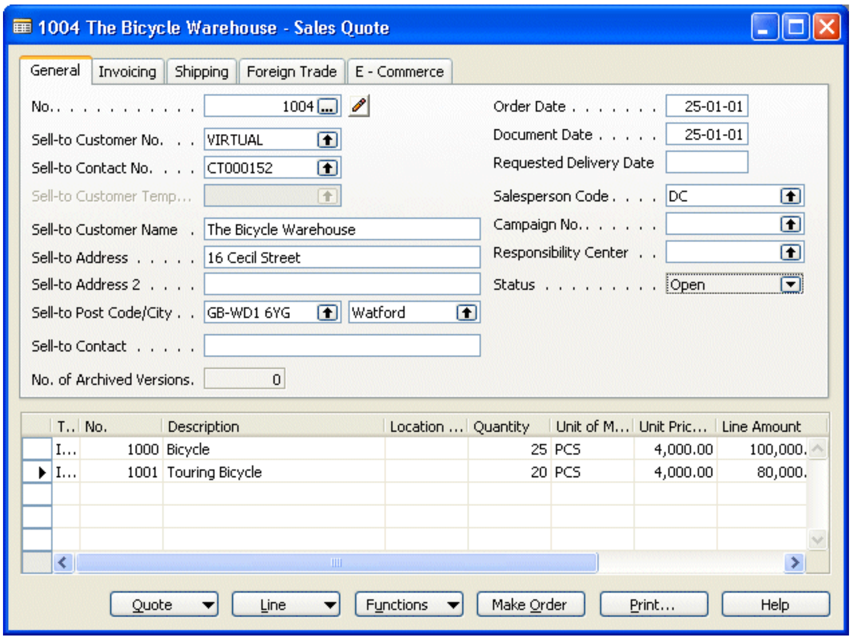


3 When you have completed steps 3 and 4, the **Statistics** window for the opportunity should look something like this:

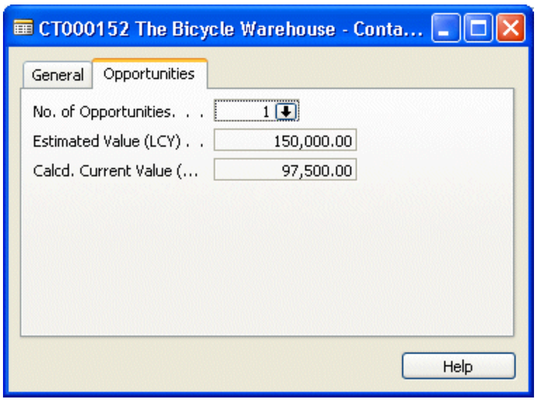


Exercise 29

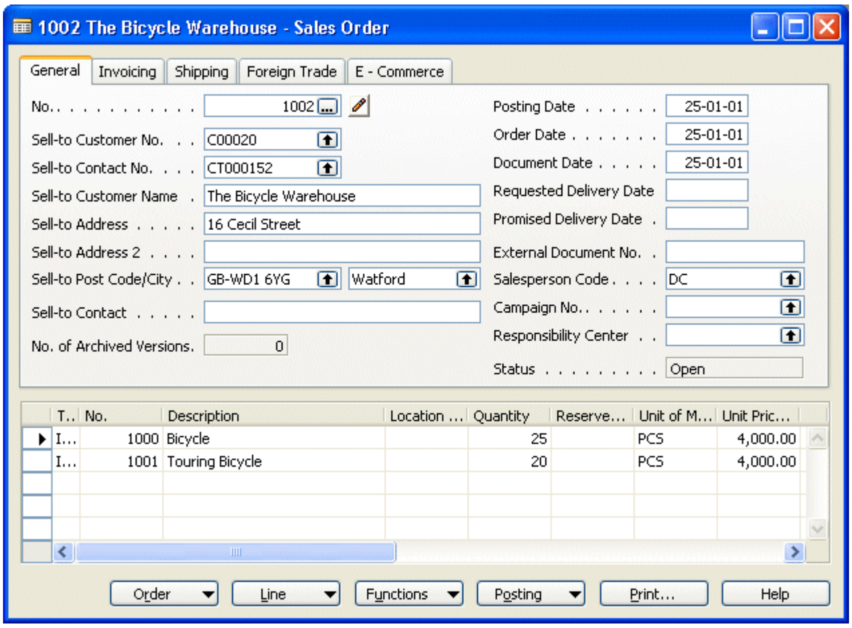
1 The **Sales Quote** window should look like this:



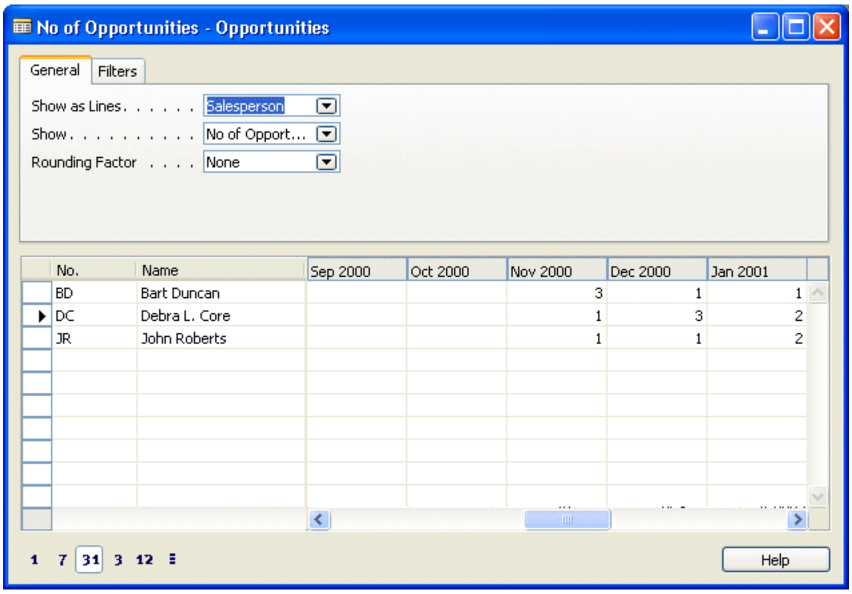
2 The Statistics window for the contact should look like this:



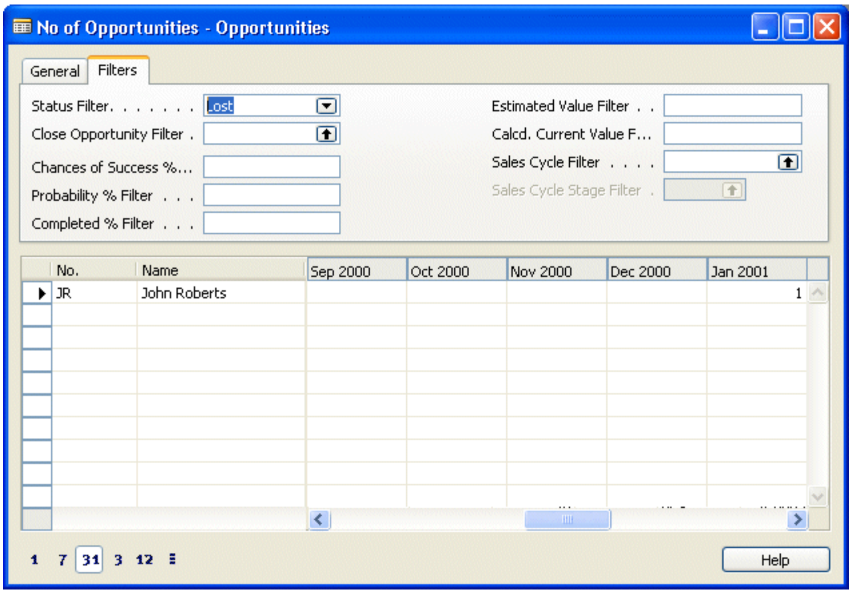
3 When you have created the contact as a customer and closed the opportunity, the order should look something like this:



4 The **Opportunities** window, the **General** tab should look like this:



5 The **Opportunities** window, the **Filters** tab should look like this:



Chapter 10

Profiling and Classification

This chapter contains the following sections:

- Introduction to Profiling and Classification
- Profile Questionnaires
- Contact Rating
- Entering Contact Profiles
- Creating Segments Using Profile Information
- Updating Profile Questionnaires
- Testing and Printing Questionnaires
- Exercises

10.1 Introduction to Profiling and Classification

In the Relationship Management application area, you can create questionnaires that provide profiles of your contacts. These profiles are visible on the lines of the contact card, giving you a quick overview of information about the contact. You can set up questions on a questionnaire to be answered automatically by the program, using information from Relationship Management or other application areas. You can also use the questionnaires and questions as filters to select contacts for segments.

Profile Questionnaires

You create your profile questionnaires to provide precisely the information you want to view on the contact card. You can create as many different questionnaires as you like, and then select the questionnaire you want to apply to each contact.

Automatic Classification of Contacts

You can have the program automatically classify your contacts according to customer, vendor and contact information by setting up automatically answered profile questions in the **Profile Questionnaires Setup** window.

After you have set up automatically answered profile questions, if you assign the profile questionnaire containing these questions to a contact, the program will automatically fill in the answers for the contact.

Only contacts that are recorded as customers can be assigned a classification based on customer data and only contacts that are recorded as vendors can be assigned a classification based on vendor data.

You can also have the program turn out a classification of your contacts based on a rating system. You simply assign different values (points) to different answers in a profile questionnaire. The program then sums up the points to group your contacts in various categories (for example in ABC customers, High/Low loyalty vendors, Platinum/Gold/Silver prospects and so on).

Reports

You can print test reports and questionnaire handouts. Both reports print the questionnaire questions and answers, but the handout is designed to be viewed by your contacts. You can set filters to determine the information and the questionnaires printed on the reports.

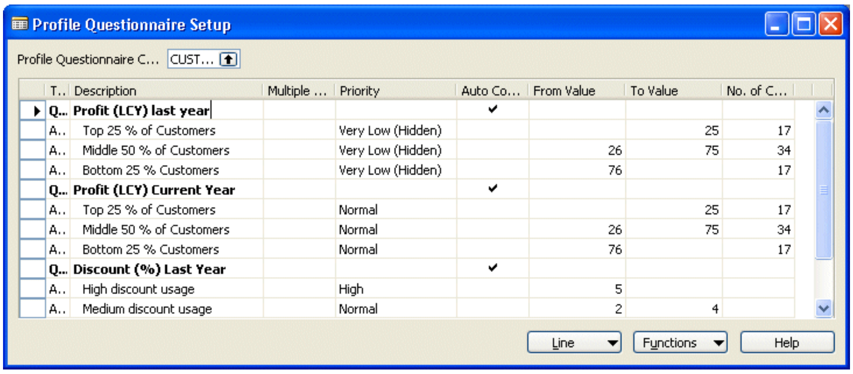
10.2 PROFILE QUESTIONNAIRES

Setting Up Profile Questionnaires

You set up profile questionnaires to include the information you want to enter on your contacts' profiles. Within each questionnaire, you can set up the different questions you intend to ask your contacts. You can also decide to have the program automatically answer some of the questions based on contact, customer or vendor data (see the following section "Automatic Classification").

To set up a profile questionnaire, follow this procedure:

1 Click Relationship Management, Setup, Profile, Questionnaire Setup. The **Profile Questionnaire Setup** window appears:



2 On the header, either fill in the **Profile Questionnaire Code** field, or click the AssistButton to the right of the field to see a list of the profile questionnaires and select a profile questionnaire form the list.

3 On the **Profile Questionnaire** lines, click the first empty line to enter the question.

4 In the **Type** field, select *Question*.

5 If more than one answer can apply to a contact, place a check mark in the **Multiple Answers** field.

Once you have filled in a line in the **Profile Questionnaire Setup** window with a question, you must then fill in one or more lines with answers to the question. These lines must be right below the line with the question. You fill in the answers in the order that you would want them to appear on a printed questionnaire.

6 In the line below the Question line, in the **Type** field, select *Answer*.

A question will normally have at least two possible answers.

7 In the **Priority** field, select the priority level you want to assign to the answer.

8 Repeat steps 4 to 6 to enter all the questions and answers within the profile questionnaire.

Moving Lines Up or Down

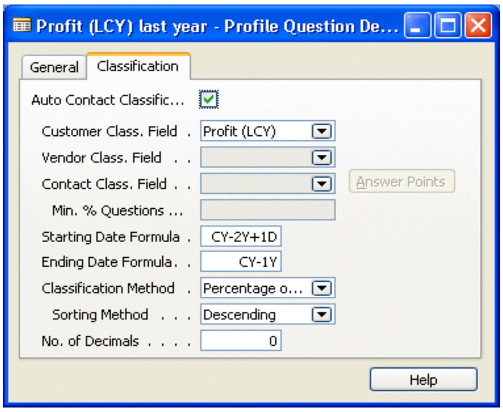
If you discover that you need to move a line in your questionnaire to a different line, for example if you want the answers to a question to appear in a different order, or to move a question and its answers to a different place in the questionnaire, you can do this with ease. Select the line to be moved and click Function, Move Up or Function, Move Down. The line is then moved up to the line above or the line below.

Automatic Classification

To have the program automatically answer the questions that you have set up in the Profile Questionnaire, follow this procedure:

1 In the **Profile Questionnaire Setup** window, select the question that you want to be automatically answered, and then click Line, Question Details. The **Profile Question Details** window appears. The fields on the **General** tab are filled in for you, based on the information you entered in the **Profile Questionnaire Setup** window, but you can change them if necessary.

2 On the **Classification** tab, place a check mark in the **Auto Contact Classification** field.



3 In the **Customer Class. Field**, **Vendor Class. Field** or **Contact Class. Field** select the criteria you want the program to use to classify contacts. You can only fill in one of these fields.

4 In the **Starting Date** and **Ending Date** fields, set up date formulas for the dates the program uses to start and stop classifying contacts.

5 In the **Classification Method** field, select the method the program will use to classify the contacts. See the following section “Classification Method” for information about the different options.

6 In the **No. of Decimals** field, enter the number of decimal places you will use when filling in the **From Value** and **To Value** fields (in the **Profile Questionnaire Setup** window) for answers to the question.

7 You only need to fill in the **Sorting Method** field if you selected *Percentage of Value* or *Percentage of Contacts* in the **Classification Method** field.

8 Close the **Profile Question Details** window.

9 In the **Auto Contact Classification** field of the **Profile Questionnaire Setup** window, fill in the **From Value** or **To Value** field appropriately.

Classification Method

The **Classification Method** field determines the method the program will use to classify contacts. There are three options: *Defined Value*, *Percentage of Value* and *Percentage of Contacts*.

Select *Defined Value* if you want the automatic classification to be based on a defined value of sales, purchases, and so on. For example, you can define answer A to apply only to contacts where your profit is less than 30,000 LCY, answer B to apply to the contacts where your profit is between 30,000 and 149,999 LCY, and answer C to apply to the contacts where your profit is more than 150,000 LCY.

Select *Percentage of Value* if you want the automatic classification to be based on a percentage of sales, purchases, and so on. If you select this option, you can define the way the program will sort the contacts in the **Sorting Method** field. For example, you can define answer A to apply to the contacts that make up the lowest 30% profit, answer B to the contacts that make up the next 50 %, and answer C to the contacts that account for the top 20% of your profits.

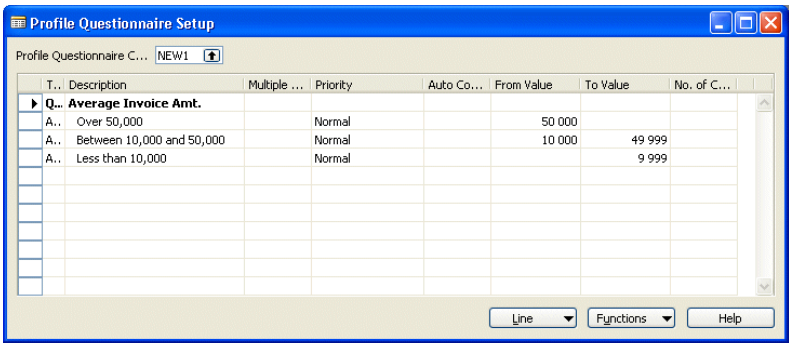
Select *Percentage of Contacts* if you want the automatic classification to be based on a percentage of contacts. For example, you can define answer A to apply to the 20% of your contacts that you have profited most from, answer B to the next 50 %, and answer C to the last 30%.

Example: Using Automatic Classification

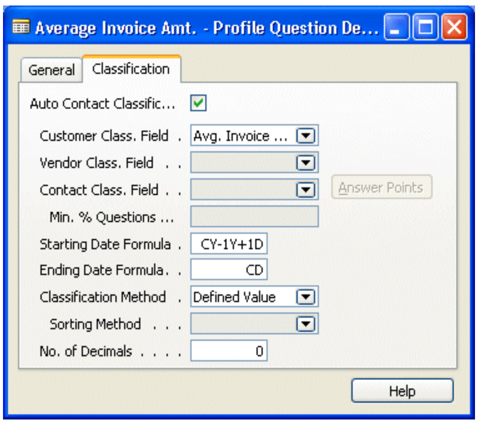
You want to classify your contacts according to average invoice size:

Answer	Applies to
A	contacts that have average invoice size over 50,000 LCY
B	contacts that have average invoice size between 10,000 and 49, 999 LCY
C	contacts that have average invoice size less than 9 999 LCY

To do this, you fill in the **Profile Questionnaire Setup** window like this:



Then you fill in the **Classification** tab in the **Profile Question Details** window like this:



10.3 Contact Rating

You can create ratings for your contacts to be displayed on the contact card. You can use a number of existing questions and answers and combine them with new questions and answers to form the basis of your rating. Each answer in the rating is given a number of points and, depending on the range you set up for the categories (From Value and To Value), the rating system will group your contact in the categories you have defined, for example *High, Low*, or *A, B*, and *C*.

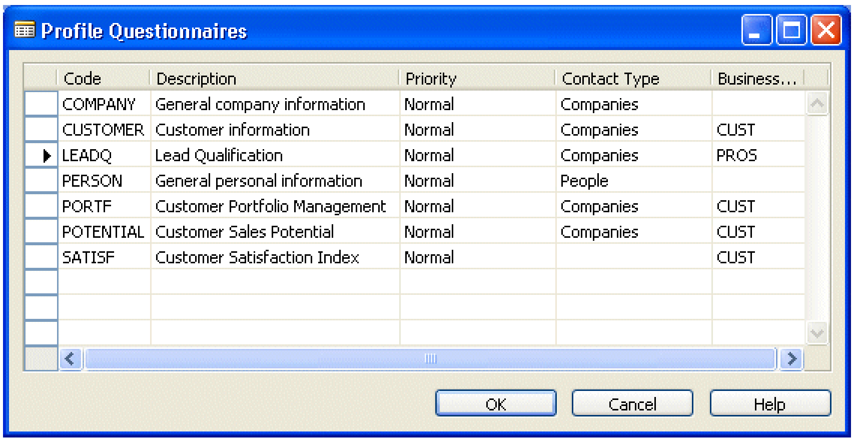
There are two methods for rating your contacts: You can either use the wizard (click Relationship Management, Setup, Profile, Questionnaire Setup, then click Functions and select the **Create Rating** menu item to open the wizard), or set it up manually.

Creating Contact Ratings:

To manually create ratings for your contacts, follow this procedure:

1 Click Relationship Management, Setup, Profile, Questionnaire Setup.

2 Click the AssistButton in the **Profile Questionnaire Code** field to see a list of available profile questionnaires.



3 Either select an existing profile questionnaire or enter a new profile questionnaire by filling in the relevant fields in the window.

4 In the **Profile Questionnaire Setup** window, click the AssistButton in the **Type** field, choose *Question* and type your question in the **Description** field.

5 On the next empty line, click the AssistButton in the **Type** field, choose Answer and type your answer in the **Description** field.

6 In the **Priority** field, click the AssistButton and select the priority.

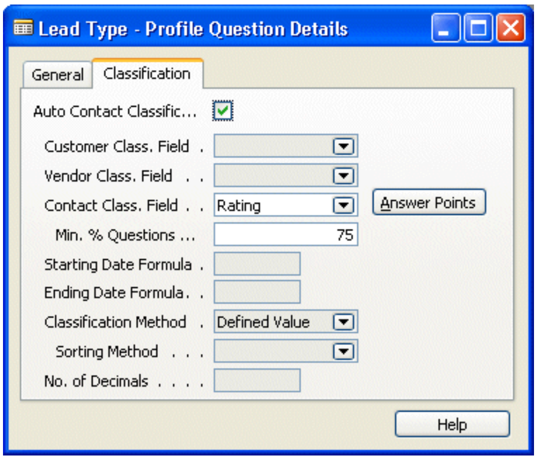
7 Insert values in the **From Value** and **To Value** fields. Contacts that receive points within the defined range will get the answer.

Repeat steps 5 to 7 to enter more answers to be included in the rating question.

8 With the cursor on the question line, click the **Line** button and select the **Question Details** menu item.

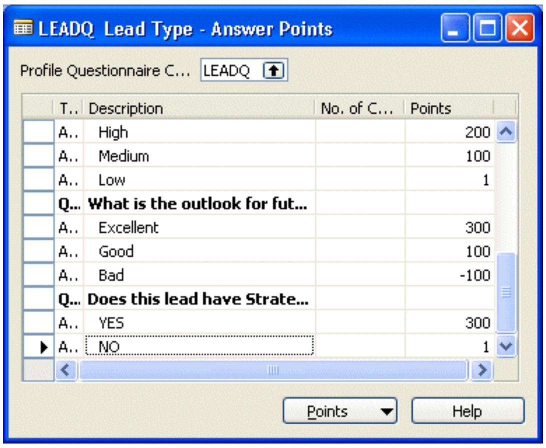
9 On the **Classification** tab, in the **Profile Question Details** window, place a check mark in the **Auto Contact Classification** field.

10 Click the AssistButton to the right of the **Contact Class. Field** field and select the Rating option.



11 Fill in the **Min. % Questions** field (0 is default).

12 Click Answer Points and enter the points you want to assign each answer listed in the **Answer Points** window.



If you want to get an overview of the points you have given each answer, click Points to open the **Answer Points List** window.

13 Return to the **Profile Questionnaire Setup** window and click Functions, Update Classification to run an update.

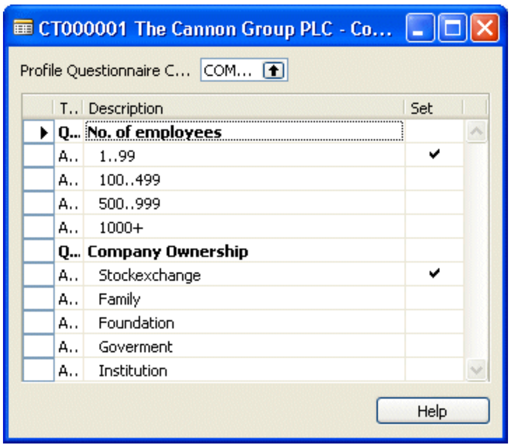
You can now see the result of your rating on the lines in two places: In the **Profile Questionnaire Setup** window (**No. of Contacts** field) and on the **Contact Card**.

10.4 Entering Contact Profiles

You enter the profile of your contacts to specify detailed information about them. You can enter all the characteristics that can help you improve your business relationships with your contacts. Follow this procedure:

1 Click Relationship Management, Contacts.

2 Find the relevant contact and click Contact, Profiles. The **Contact Profile Answers** window appears.



3 The program displays only the relevant profile questionnaires for the contact. For example, if the contact is a company, the program does not display the questionnaires assigned to contact persons.

4 In the **Profile Questionnaire Code** field, click the AssistButton to see the profile questionnaires. Select the questionnaire that you want to apply to the contact and click OK.

5 The **Contact Profile Answers** window contains a list of questions and answers. Place a check mark in the relevant **Set** fields for each question.

The program automatically enters the answers on the lines of the contact card.

10.5 Creating Segments Using Profile Information

You can use profile information to add contacts to segments for your campaigns. You do this in the third window of the **Segment** wizard. Follow this procedure:

1 Click Relationship Management, Segments.

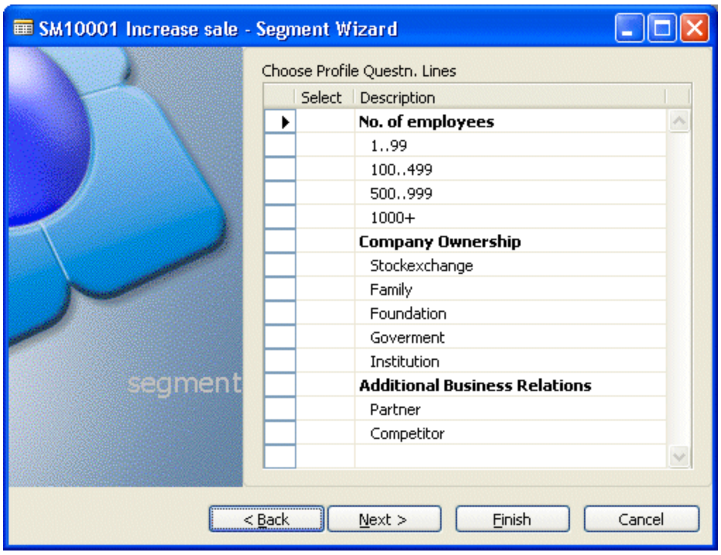
2 Find the segment card for the relevant segment (or press F3 to create a new one).

3 Click Functions, Segment, Wizard. The **Segment Wizard** window appears.

4 Fill in the fields on the first two pages of the wizard. The third page of the wizard looks like this:

5 In the **Profile Questionnaire Code** field, select the relevant questionnaire.

6 On the next page of the wizard, select the line that contains the question and answers that you want the program to use as a filter when selecting contacts for the segment.



7 Click **Next** to fill in the last page of the wizard, or click **Finish**.

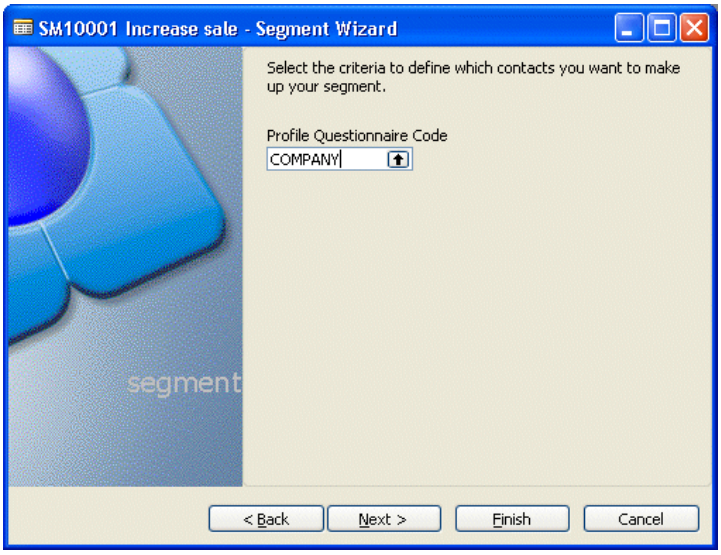
Now all the contacts that provided the selected answer on the selected questionnaire will be included in the segment.

Exercise 30 Adding Contacts to a Segment

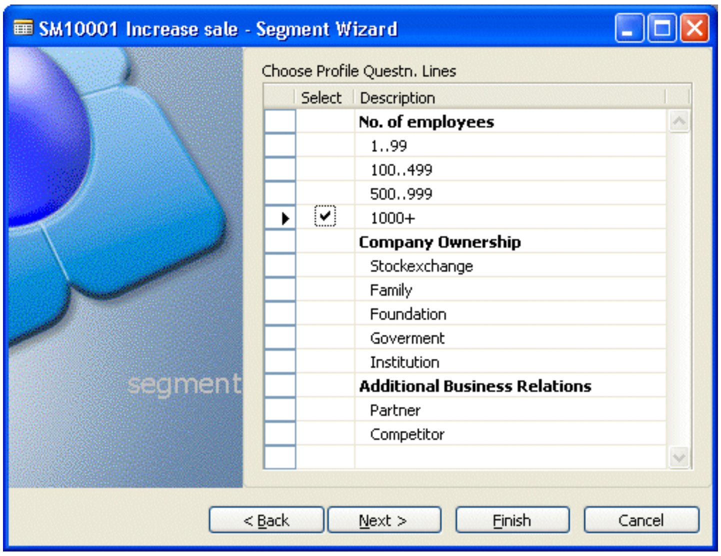
You want to add to a segment (SM 10001 - Increase Sale) all your contacts that are companies with more than 1000 employees.

Solution

To add the contacts to the segment, fill in the third window of the wizard like this:



Fill in the fourth window of the wizard like this:



10.6 Updating Profile Questionnaires

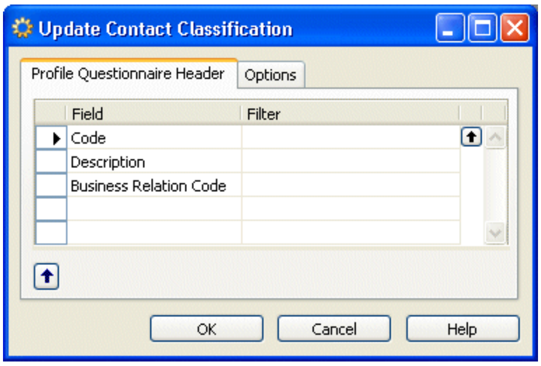
The program does not automatically update the classification of contacts. To have the correct number of contacts recorded for each answer in the **Profile Questionnaire Setup** window, you must regularly update the contact classification. You do this with the Update Contact Classification batch job.

This batch job updates all the answers to the profile questions that are automatically answered by the program, based on customer, vendor or contact data. If you want to include more information, you can select additional fields to be included in the batch job.

To update contact classification, follow this procedure:

1 Click Relationship Management, Periodic Activities, Update Contact Classification.

2 The **Update Contact Classification** window appears:



3 On the **Profile Questionnaire Header** tab, fill in the **Filter** field for **Code**, **Description** and/or **Business Relation Code** to set filters for the questionnaires to be updated. Click the up-arrow in the lower left-hand corner of the window to see the table with the filters you have set for the batch job.

4 On the **Options** tab, enter the date of the update. Only information up to and on that date will be included in the update.

5 Click OK to start the batch job. If you do not want to run the batch job now, click Cancel to close the window.

10.7 TESTING AND PRINTING QUESTIONNAIRES

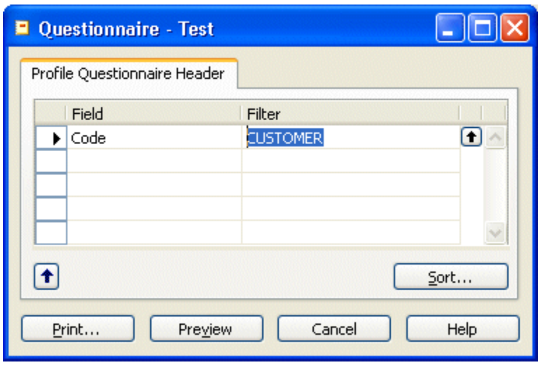
You can print test reports of your profile questionnaires. A test report lists information from each line of the **Profile Questionnaire Setup** window. You can also print questionnaires to be distributed to your contacts and returned to you.

Printing a Test Report

To print a test report, follow this procedure:

1 Click Relationship Management, Setup, Profile Questionnaire Setup.

2 In the **Profile Questionnaire Setup** window, click Function, Test Report. The **Questionnaire - Test** window appears:

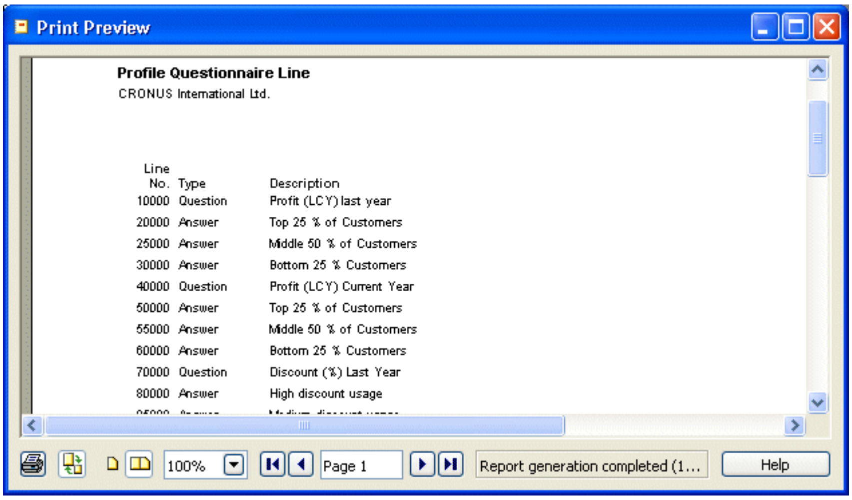


3 In the **Filter** field for **Code**, click the AssistButton and select the questionnaire you want to test (if you leave this field blank, the questions and answers for all your questionnaires will appear on the report).

4 If you want to include more information, you can select additional fields to be included in the report. To do this, in the **Field** field, press F3, click the AssistButton and then select the relevant field(s). You can set filters on any of the fields.

5 To print the report, click the Print button. To see the report on screen, click Preview. If you don't want to print the report, click Cancel.

The following picture shows a preview of the report:

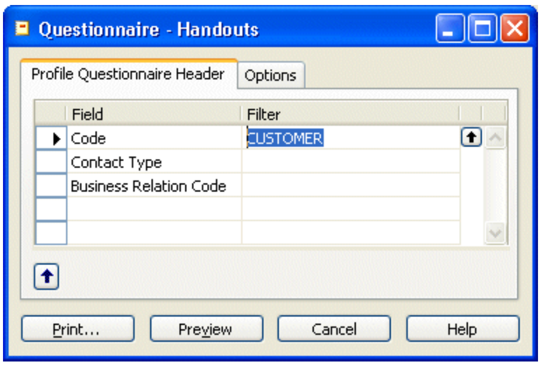


Printing the Questionnaire - Handouts Report

With the Questionnaire Handouts report, you can print your profile questionnaires and distribute them to your contacts. To print the report, follow this procedure:

1 Click Relationship Management, Setup, Profile Questionnaire Setup.

2 In the **Profile Questionnaire Setup** window, click Function, Print. The **Questionnaire – Handouts** window appears:



3 On the **Profile Questionnaire Header** tab, in the **Filter** field for **Code**, click the AssistButton and select the questionnaire that you want to print. If you leave this field empty, all your questionnaires will be printed.

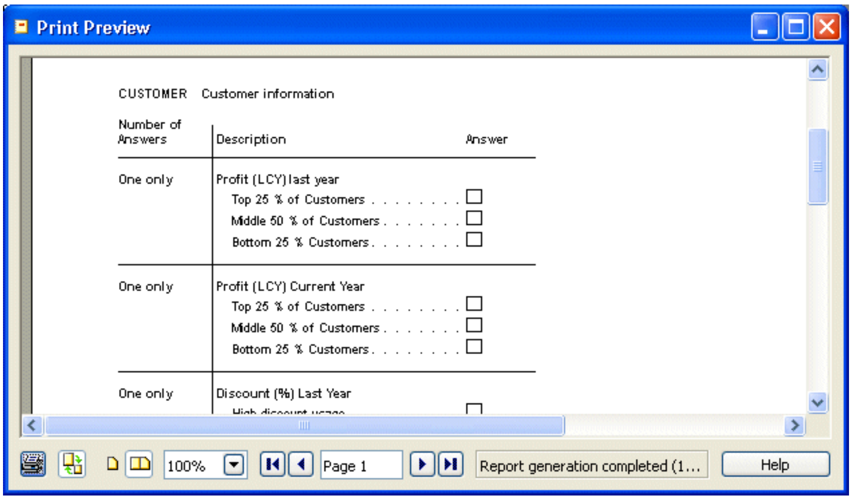
4 If you want to include more information, you can select additional fields to be included in the report. To do this, in the **Field** field, press

F3, click the AssistButton and then select the relevant field(s). You can set filters on any of the fields.

5 On the **Options** tab in the **Print Classification Fields** field, click to insert a check mark if you want the report also to include the questions that are automatically answered by the program.

6 To print the report, click the Print button. To see the report on screen, click Preview. If you don't want to print the report, click Cancel.

The following picture shows a preview of this report:



10.8 EXERCISES

Exercise 31 **Setting Up a Questionnaire**

You want to set up a new questionnaire for contacts that are vendors.

1 Set up the following questions and answers (or make up your own – but make at least one question use automatic classification):

Purchase (LCY) Current Year (use percentage of value)

Discount % (defined value)

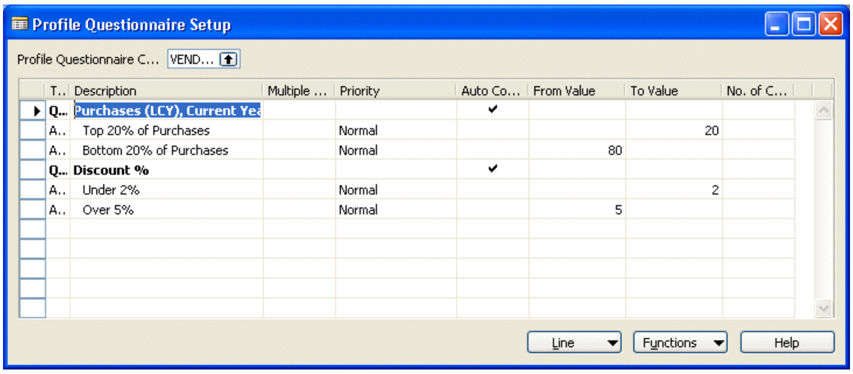
2 Enter the questionnaire for the contact AR Day Property Management, and view the questions and answers on the contact card.

3 Update the contact classification and look at the results in the **Profile Questionnaire Setup** window.

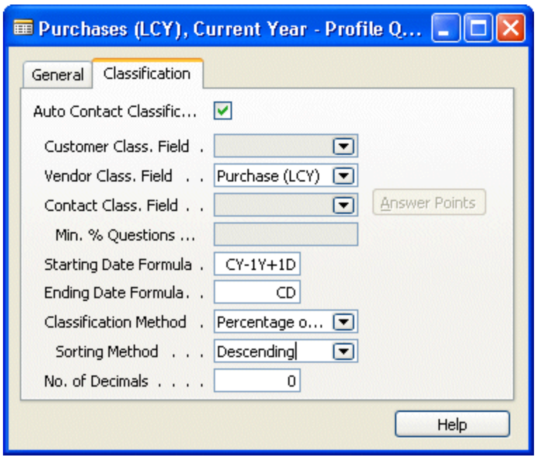
4 Print a test report for your new questionnaire.

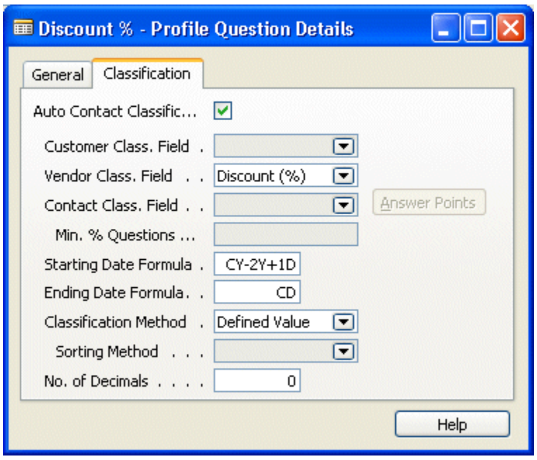
Solution

1 When you have set up the new questionnaire, the **Profile Questionnaire Setup** window should look like this:

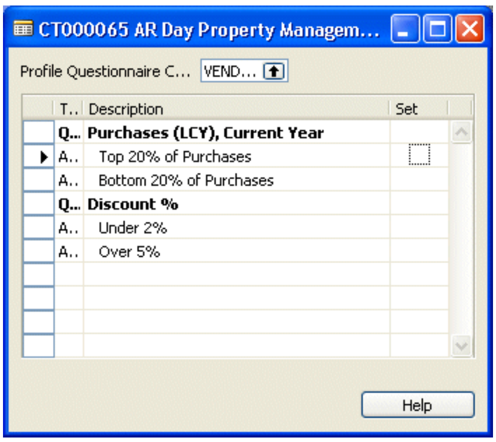


The **Profile Question Details** windows for the first two questions should look like these:



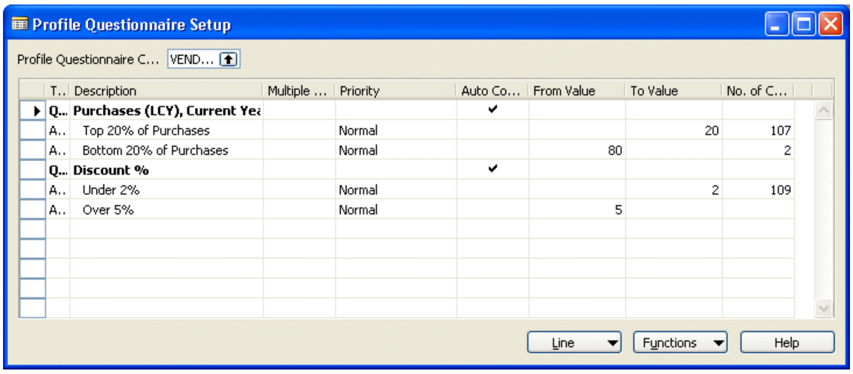


2 If you have not selected the **Auto Contact Classification** check box, you can manually select the right answers for the contact in the **Contact Profile Answers** window.

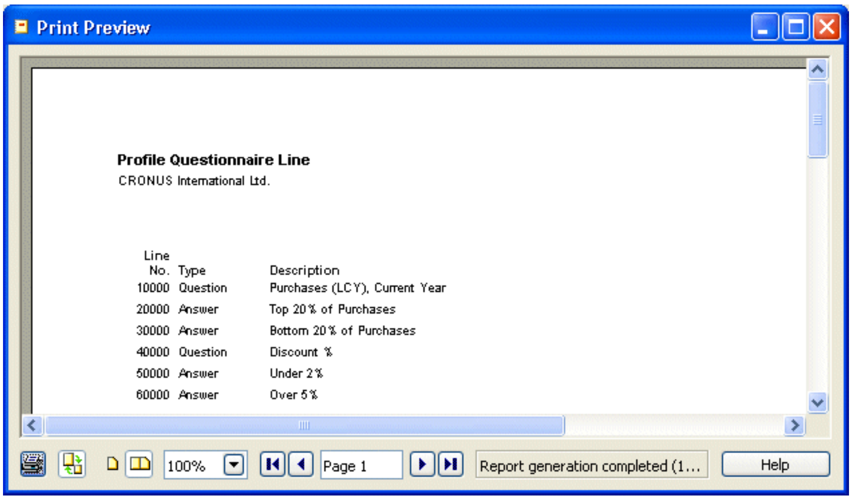


If the **Auto Contact Classification** option has been selected, the fields in this window will be disabled, and no questions or answers for this profile will be displayed.

3 The **Profile Questionnaire Setup** window should look like this:



4 The test report looks should look like this in the **Preview** window:

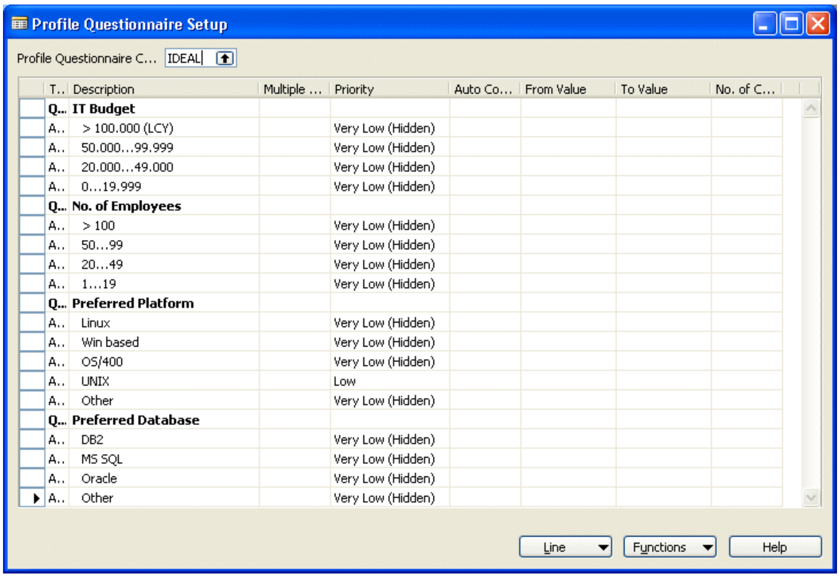


Exercise 32 Rating Your Contacts

You want to make a rating of your prospects to make it possible for you to identify the ideal prospects to focus your sales campaign on. You choose to base the rating on four different questions to group your prospects in the following categories: Ideal, Good, Average, Not interesting.

1 Create a new profile questionnaire with the code name IDEAL.

2 Set up the following questions and answers in the questionnaire:

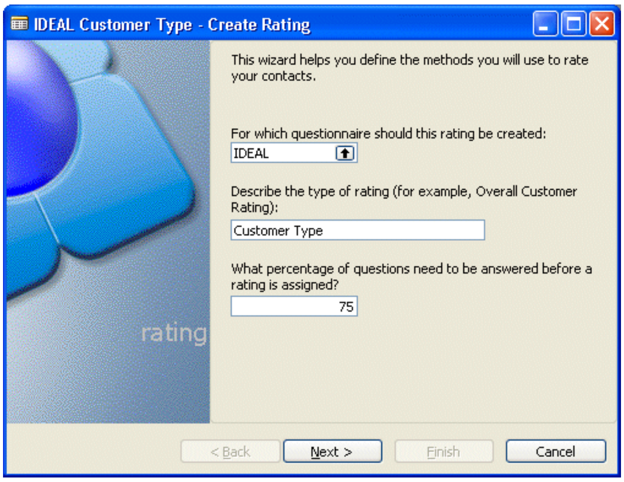


3 Now create the rating of your prospects based on these four questions in order to group them in the categories: Ideal, Good, Average, Not interesting.

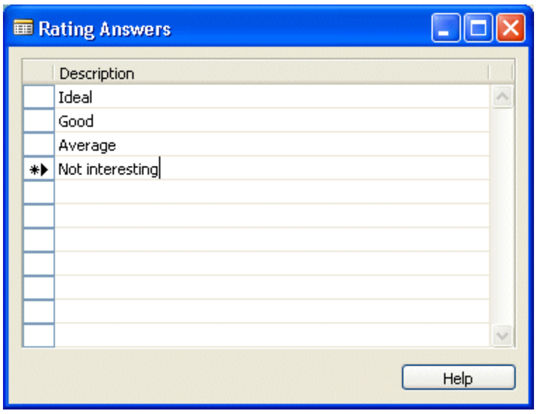
Solution

1 Use the **Create Rating** wizard to do the rating for you. In the **Profile Questionnaire** window, click Functions, Create Rating**.**

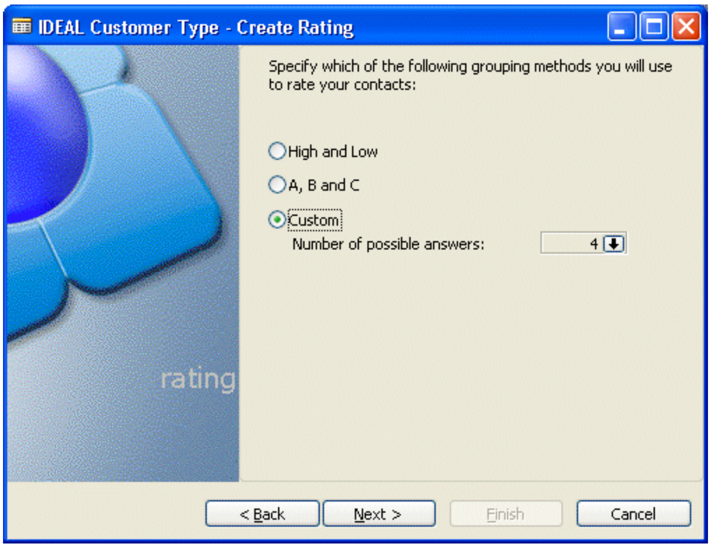
2 Fill in the first page of the wizard as follows:



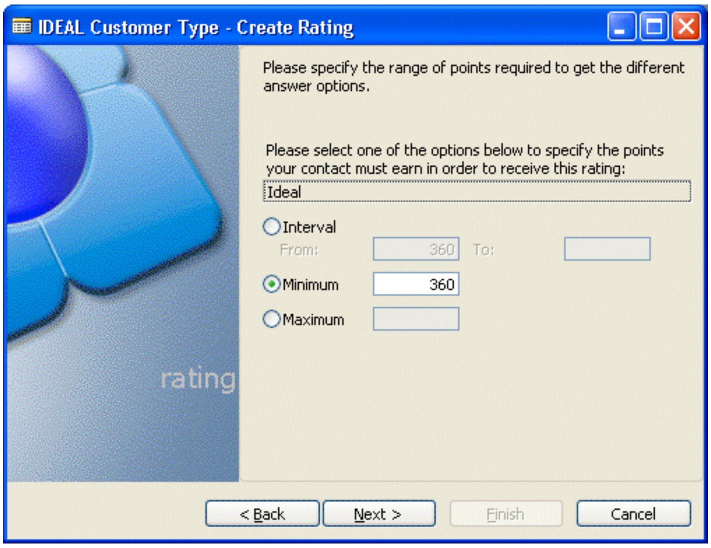
3 On the second page, select *Custom*. The **Rating Answers** window appears. Fill it in as follows:



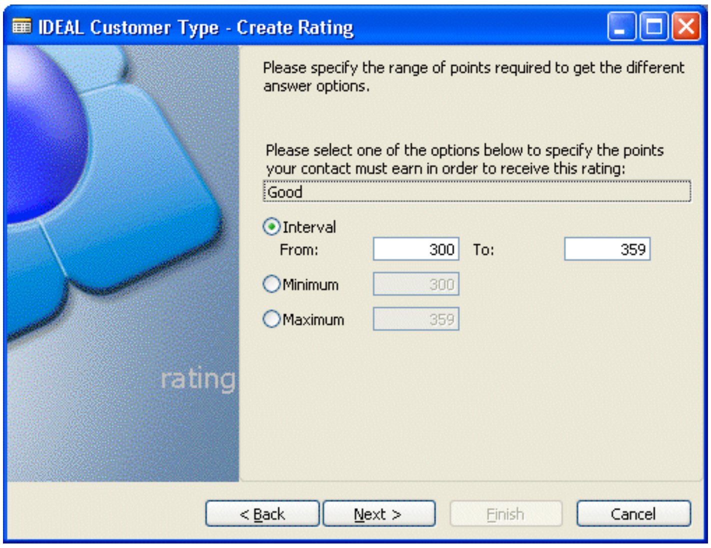
After you close the **Rating Answers** window, the second page of the wizard should look like this:

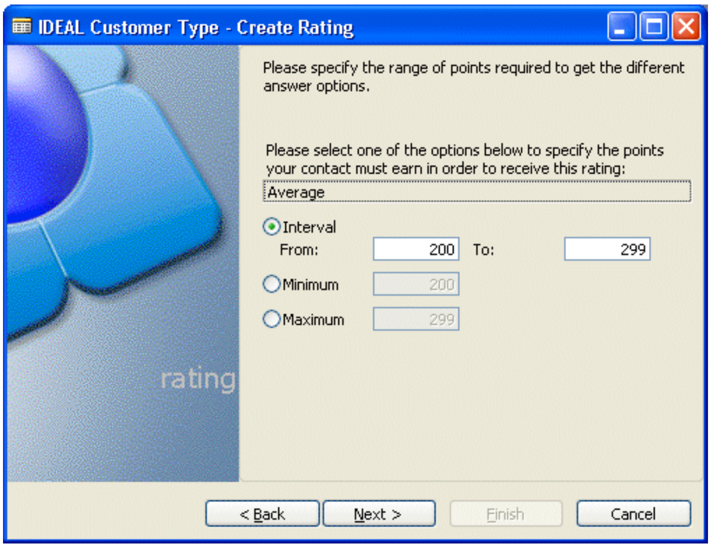


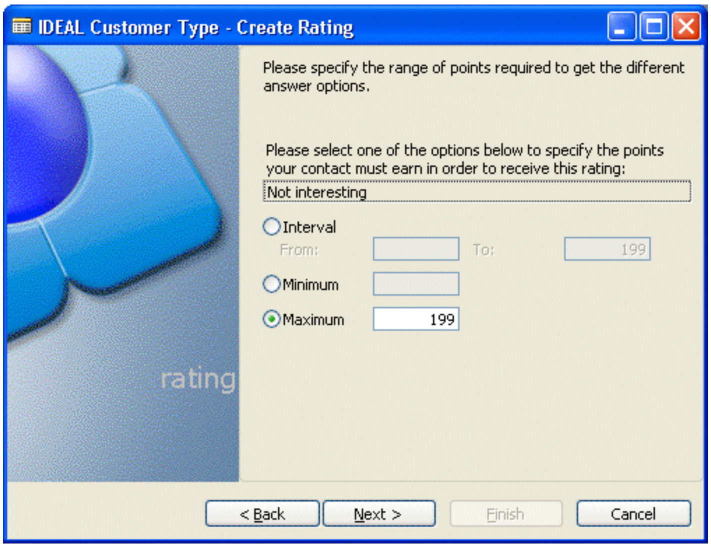
4 In your points system, the maximum number of points a prospect can score is 400, but you want the program to return ideal prospects who have scored from 360 points and above. Therefore, the next page of the wizard should look like this:



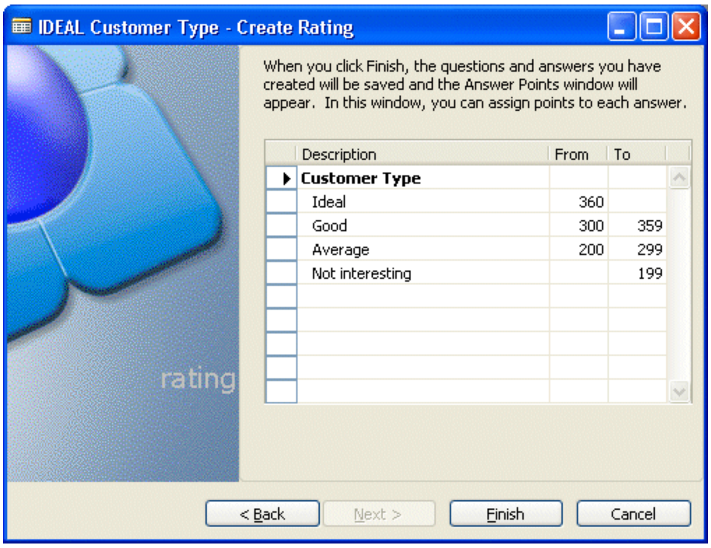
5 On the following three pages, fill in the points as shown:





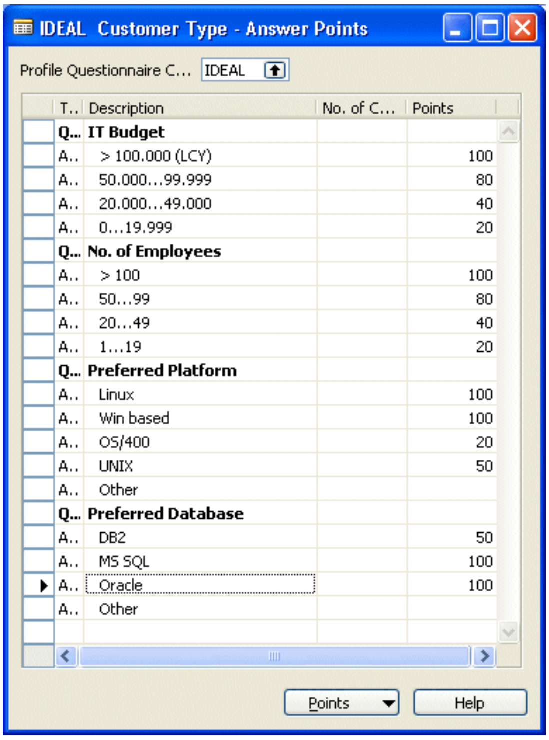


6 On the last page you get an overview of the listed points in the four categories. It should look like this:

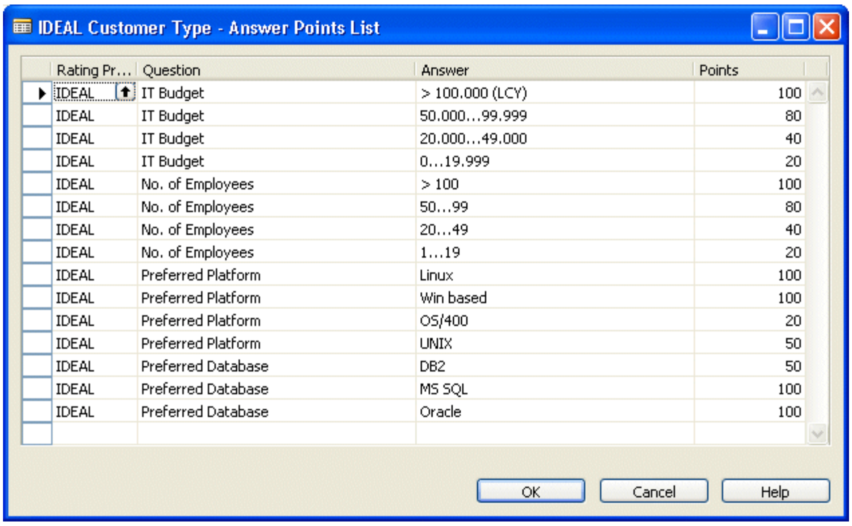


If you have made any mistakes, you can click Back and make your corrections on the relevant page.

7 Click Finish to complete the rating. The **Answer Points** window opens and you can now enter, in the **Points** field, the points you want to assign each answer.

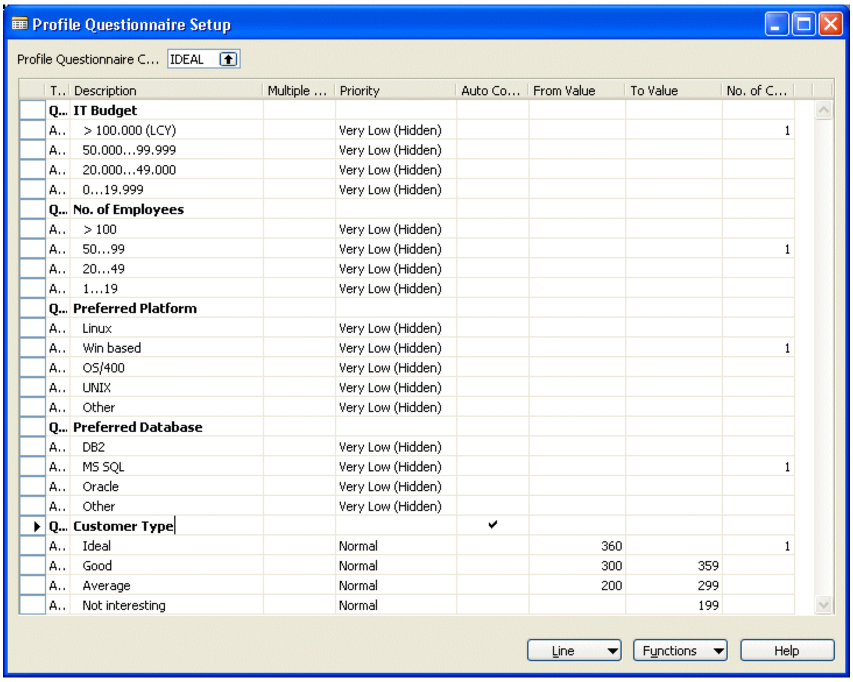


8 If you want an overview of the distribution of total points on different answers, click Points, List to open the **Answer Points List** window:



Rating Pr...	Question	Answer	Points
IDEAL	IT Budget	> 100.000 (LCY)	100
IDEAL	IT Budget	50.000...99.999	80
IDEAL	IT Budget	20.000...49.000	40
IDEAL	IT Budget	0...19.999	20
IDEAL	No. of Employees	> 100	100
IDEAL	No. of Employees	50...99	80
IDEAL	No. of Employees	20...49	40
IDEAL	No. of Employees	1...19	20
IDEAL	Preferred Platform	Linux	100
IDEAL	Preferred Platform	Win based	100
IDEAL	Preferred Platform	OS/400	20
IDEAL	Preferred Platform	UNIX	50
IDEAL	Preferred Database	DB2	50
IDEAL	Preferred Database	MS SQL	100
IDEAL	Preferred Database	Oracle	100

9 The rating question (Customer Type) is now added to the profile questionnaire with the **From Value** and **To Value** fields filled out. Since you are only interested in having the Customer Type answers displayed on the contact card, you select Very Low (Hidden) in the **Priority** fields for the other answers.



T..	Description	Multiple ...	Priority	Auto Co...	From Value	To Value	No. of C...
Q...	**IT Budget**						
A..	> 100.000 (LCY)		Very Low (Hidden)				1
A..	50.000...99.999		Very Low (Hidden)				
A..	20.000...49.000		Very Low (Hidden)				
A..	0...19.999		Very Low (Hidden)				
Q...	**No. of Employees**						
A..	> 100		Very Low (Hidden)				
A..	50...99		Very Low (Hidden)				1
A..	20...49		Very Low (Hidden)				
A..	1...19		Very Low (Hidden)				
Q...	**Preferred Platform**						
A..	Linux		Very Low (Hidden)				
A..	Win based		Very Low (Hidden)				1
A..	OS/400		Very Low (Hidden)				
A..	UNIX		Very Low (Hidden)				
A..	Other		Very Low (Hidden)				
Q...	**Preferred Database**						
A..	DB2		Very Low (Hidden)				
A..	MS SQL		Very Low (Hidden)				1
A..	Oracle		Very Low (Hidden)				
A..	Other		Very Low (Hidden)				
Q...	**Customer Type**			✔			
A..	Ideal		Normal		360		1
A..	Good		Normal		300	359	
A..	Average		Normal		200	299	
A..	Not interesting		Normal			199	

Chapter 11

Multilanguage Salutation and Attachment

This chapter contains the following sections:

- Introduction
- Creating Salutation Formulas
- Assigning Salutation Code to the Contact
- Creating an Interaction Using Salutation Code
- Creating an Interaction Using a Segment Including Logging of the Segment
- Exercises
- Solutions

11.1 INTRODUCTION

The Multilanguage Salutation and Attachment feature allows you to set up salutations in different languages and attach documents to these salutations in different languages.

When you have set up the salutations, the program automatically chooses the salutation in the language in which the customer or contact is set up.

It is therefore very easy to send out a standard document to international customers of different nationalities.

Description of the Multilanguage Salutations and Attachments Feature

To be able to interact with a contact in his or her preferred language and to salute the contact accordingly, the new solution will allow the user to select documents in several languages and to salute the contact in his or her own language. For this to succeed, the new solution will use language as a key element when interacting with contacts.

When you insert a contact it will be possible to select from different contact salutations depending on the contacts language, profession, sex, and so on. When you interact with a contact, you can choose from at least formal and informal salutations in the same document.

To be able to draw the full potential of the new Multilanguage Salutation solution, it is also possible to have attachments in multiple languages.

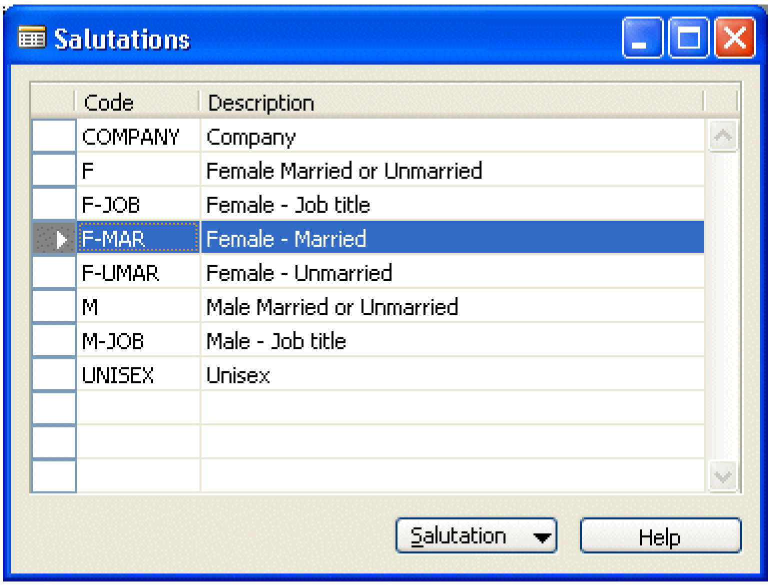
11.2 SETTING UP SALUTATION FORMULAS

In the **Salutation Formulas Setup** window, you can set up various salutation formulas you can use when sending any kind of correspondence to contacts.

You can create a salutation formula according to the Salutation Type formal, informal, language, gender, contact language, job title and so on.

You set up the salutation formula in the following way:

1 Click Relationship Management, Setup, Interaction, Salutations, and the **Salutations** window appears.



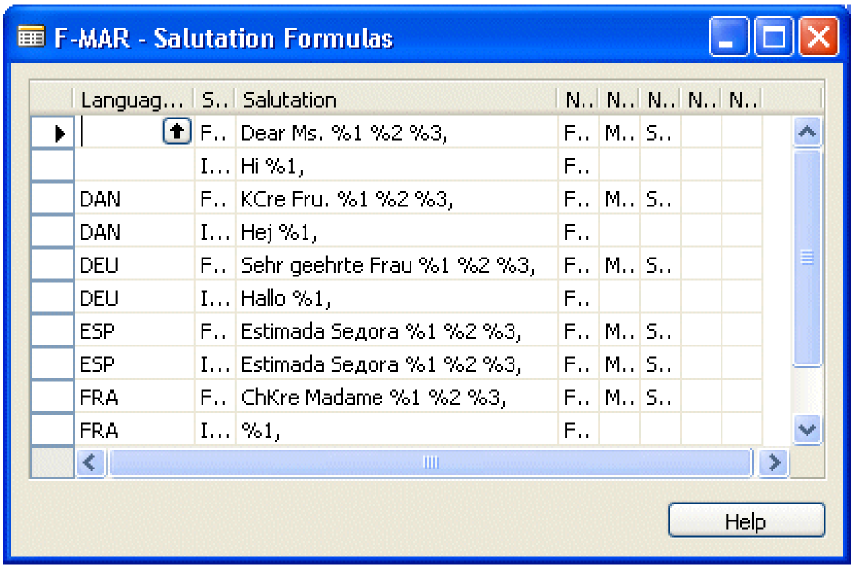
2 Select the code, you want to set up, for example F-MAR (Female – Married), and Click Salutation, Formulas. The **Salutation Formulas** window appears.

3 In the **Language Code** field**,** click the AssistButton, and the **Languages** window appears. Pick a language code from this list, or create a new one, if necessary.

4 Click OK.

5 In the **Salutation Type** field, click the AssistButton, and a list with the options, Formal or Informal appears. Select one.

In the **Salutation** field**,** type a formula like the one shown in the following screenshot. Here we have chosen to use a formula in English, such as: *Dear Ms. %1 %2 %3.*



Note

If you choose a different language, for example, German you should type the German word for Dear.

6 By clicking the AssistButton in the **Name 1** field**,** you select one of the parameters that will compose the first part of the formula (%1). You can select between Job Title, First Name, Middle Name, Surname, Initials, and Company Name.

7 By clicking the AssistButton in the **Name 2** field, you can select another of the parameters that will compose the second part of the formula (%2). Again, you can select between Job Title, First Name, Middle Name, Surname, Initials, and Company Name.

Note

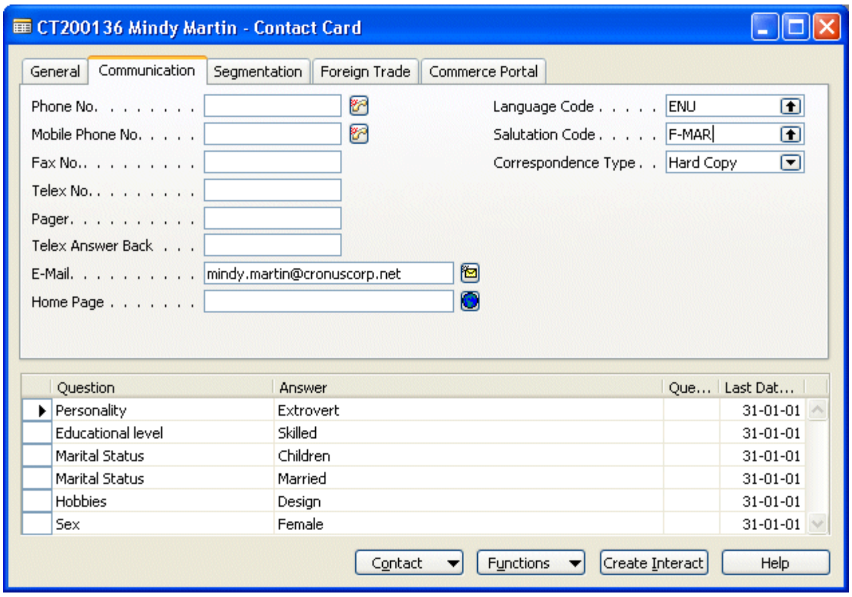
You can select up to five parameters (%1 %2 %3 %4 %5), using the same procedure as described in Step 6 and 7.

11.3 ASSIGNING SALUTATION CODE TO THE CONTACT

When you insert a contact, you can select from different contact salutations depending on the contacts language, profession, sex, and so on.

When the Salutation code has been set up, it should be assigned to the contact on the Contact Card.

This is done by clicking the AssistButton to the right of the **Salutation Code** field and selecting the salutation code from the list in the **Salutations** window.



11.4 Creating an Interaction Using Salutation Code

When you interact with a contact, you can choose from at least formal and informal salutations in the same document.

You can correspond with a contact or a customer using the salutation code, you have just set up.

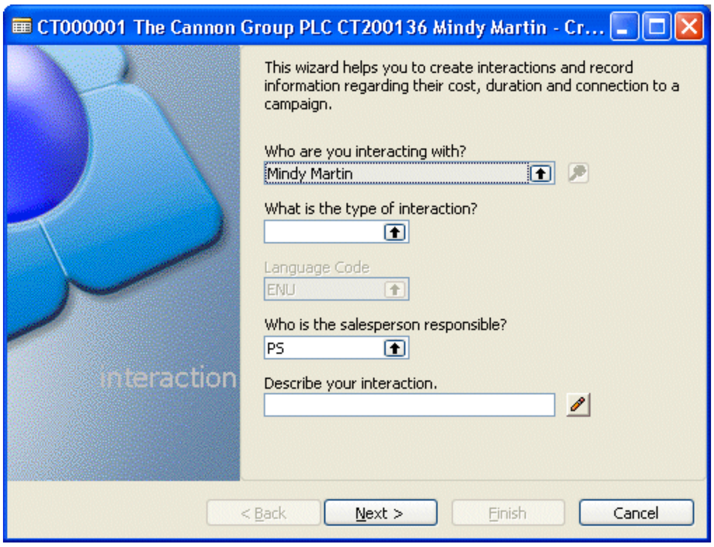
Note

Before you begin this procedure, you should have filled in the **Language Code** field**,** the **Salutation Code,** and the **Correspondence type** fields to the Contact Card.

English is the default language, and therefore the language code is blank.

You create the interaction using the following procedure:

1 On the Contact Card, click Create Interaction and the **Create Interaction** wizard appears.



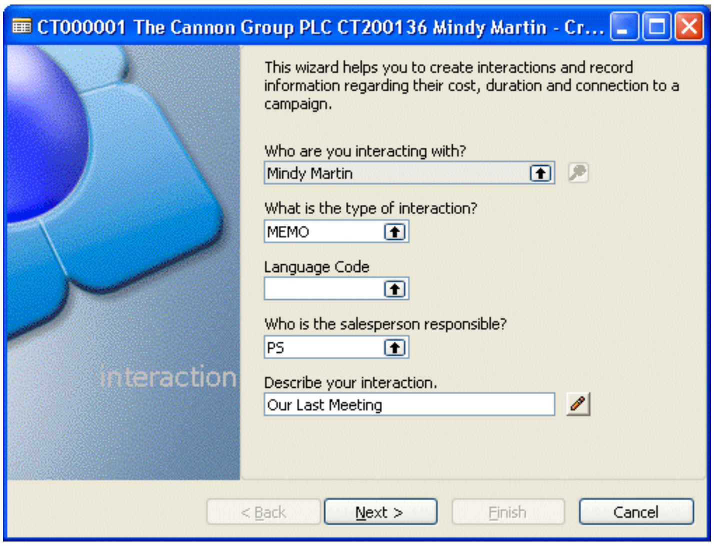
2 In the **What is the type of interaction?** field, you use the AssistButton to select the relevant type of interaction.

Note

You should check if the type of interaction has an attachment attached to it. If not, you can create one by clicking Attachment, Create.

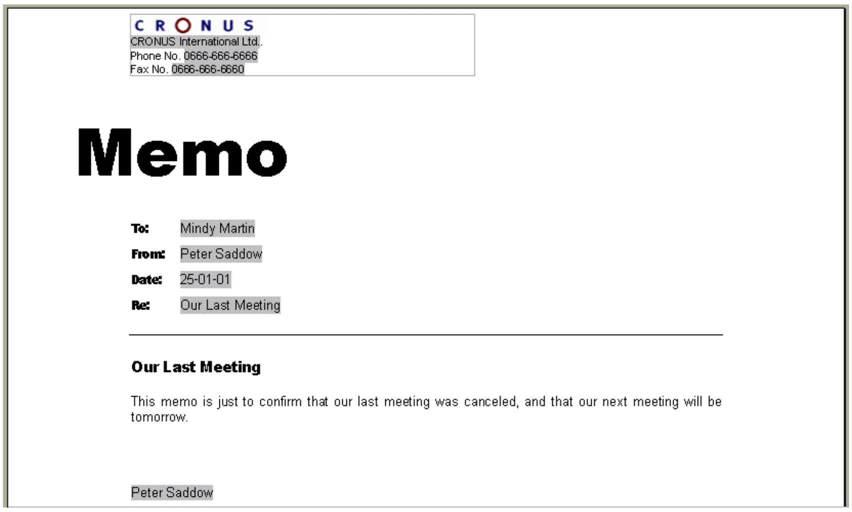
3 Click OK.

4 In the **Describe your interaction** field, you should write the heading of your document.



5 Follow the instructions of the wizard, until the Word document appears. Add the necessary text to the document and close the Word document by clicking the top right hand X (close). It is not necessary to save the document, as it will be imported into Navision.

The following is an example of a Word document:



6 Finish the wizard.

7 Print out the document and send it to the contact.

11.5 Creating Interaction using a Segment Including Logging of the Segment

You can create a segment and use it for campaigns to a group of contacts.

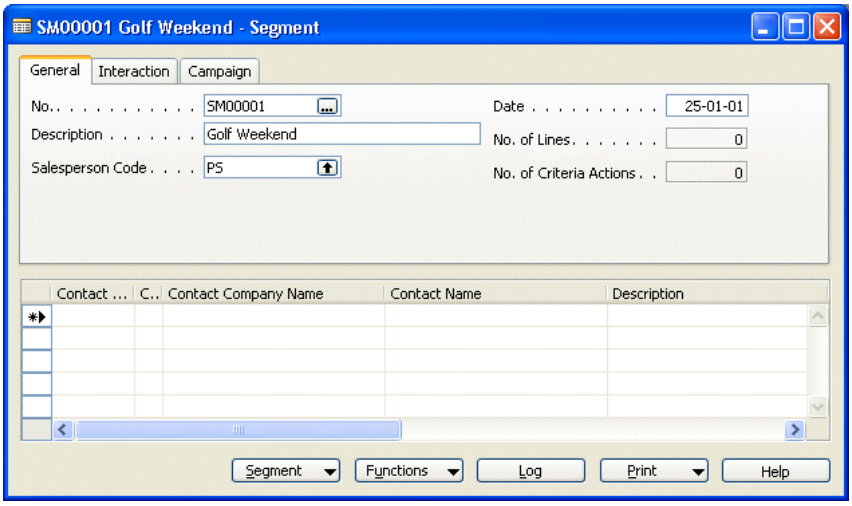
This is done in the following way:

1 In Relationship Management, click Segment and the **Segment** window appears.

2 Create a new segment and in the **No.** field, press Enter. The program automatically enters the next available number in the number series for segments.

3 In the **Description** field enter a description for the segment.

4 Click the AssistButton to the right of the **Salesperson Code** field, to enter the responsible salesperson.



5 On the Interaction tab, in the **Interaction Template** field, select the relevant Interaction Template, for example GOLF, and click OK.

6 In the **Language Code (Default)** field, click the AssistButton to open the **Interaction Templ. Languages** window and select the language you want to work with.

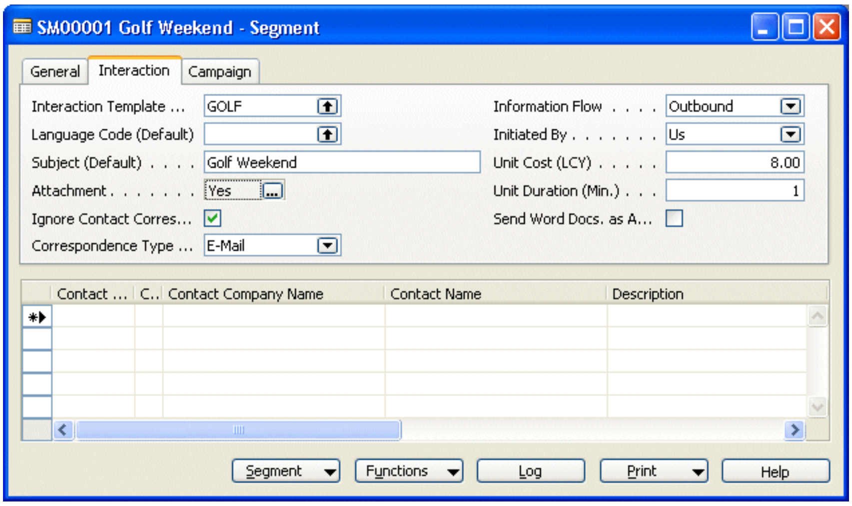
7 Click the AssistButton to the right of the **Attachment** field. The program opens a Word document.

8 Type the relevant text in the Word template, and close it. The program

will now import the word document into Navision.

9 Repeat this for the other languages.

10 In the **Subject** field, type the Heading of your Word document in the relevant languages.

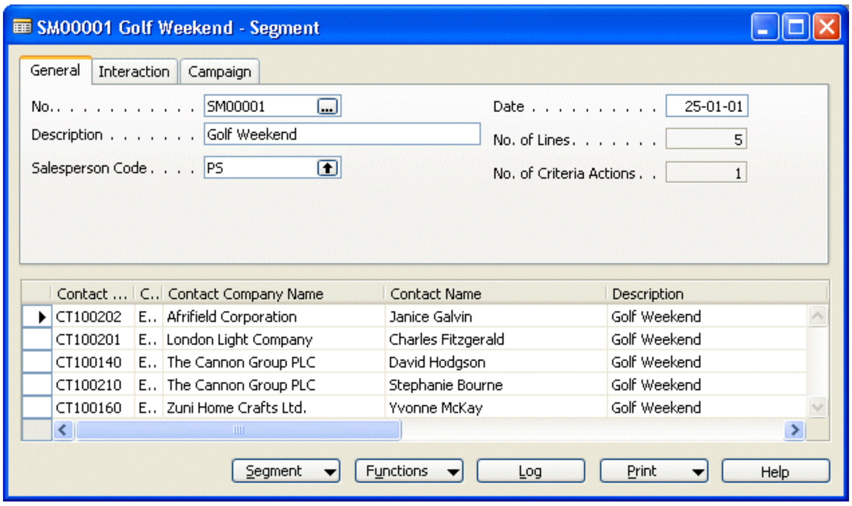


11 In the **Segment** window, click Functions, Segment, Wizard, and the Segment Wizard appears.

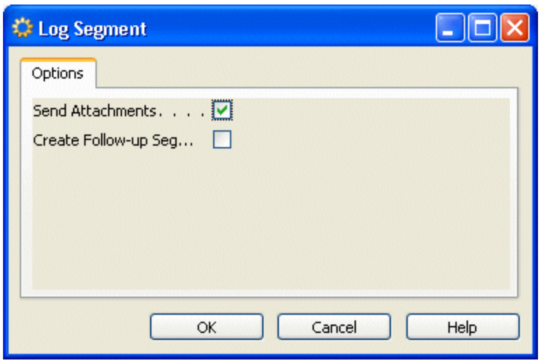
12 Click Next to continue adding contacts.

13 Fill in the **Business Relations** field and other relevant fields, and click OK.

14 Click Finish, and a list of all contacts included in the segment appears.



15 Click Log, and then click OK in the **Log Segment** batch job request window that appears.



The program will send e-mails to all the contacts included in the segment.

11.6 Exercises

Exercise 33 **Creating Salutation Formulas**

As a salesperson working for Cronus, you regularly meet prospective customers.

You want to create salutation formulas that can be used when sending correspondence to these contacts.

You know that you can use a number of parameters in the setup: salutation type (formal, informal), language, gender, contact language, job title.

1 Set up a formal salutation for job title and surname for a male in English.

2 Set up an informal salutation for a male in English.

Assign the salutation code to a contact card.

Exercise 34 **Creating Interaction Using a Segment**

This year at Cronus you have decided to sponsor a major national golf tournament and you would like to invite some of your contacts to attend this event.

1 Create a segment with contacts that are already registered as customers.

2 Use the Golf interaction template.

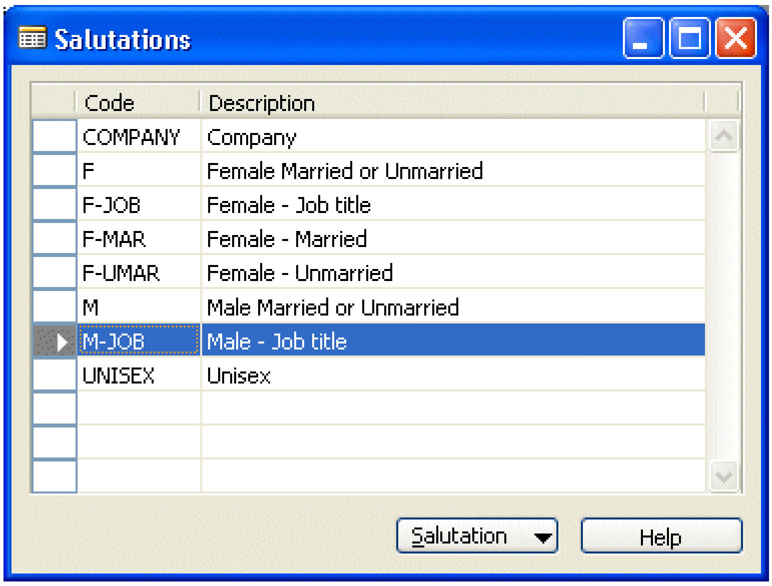
3 Write the subject of the event and the content of the document.

4 Log the segment in order to create interactions for the contact.

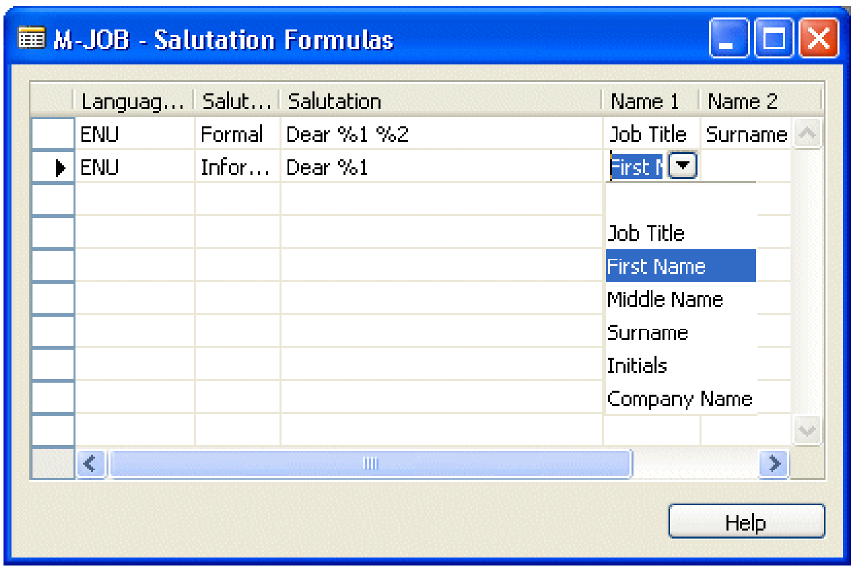
11.7 Solutions

Exercise 33

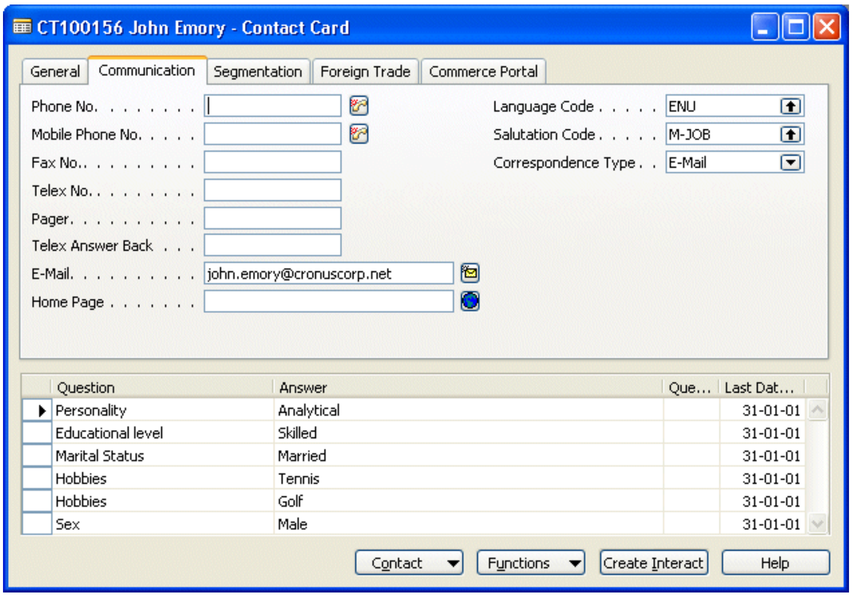
After the *Male – Job title* salutation has been selected, the **Salutations** window should look like this:



After you have set up formal and informal salutations, the **Salutation Formulas** window should look like this:

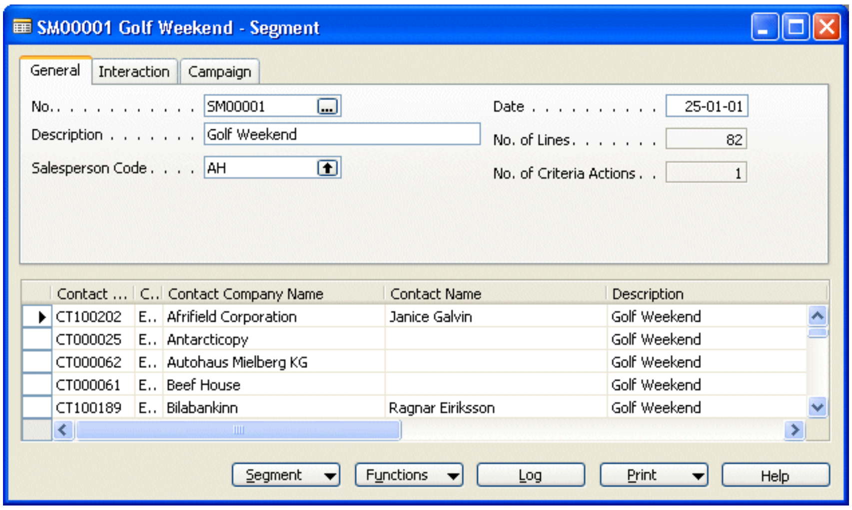


When you have assigned the Salutation code to the **Contact Card**, it should look like this:

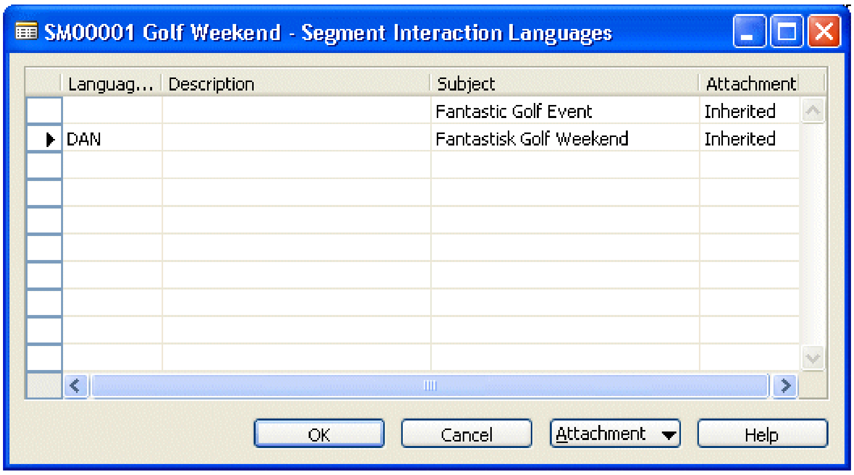


Exercise 34

When you have created the segment, the **Segment** window should look like this:



When you have filled in the subject, the **Segment Interaction Languages** window should look like this:



The Word document could look like this:

CRONUS
CRONUS International Ltd.
5 The Ring
Westminster
GB-W2 8HG London

Afrifield Corporation

Janice Galvin

100 Maidstone Ave.

Maidstone, GB-ME5 6RL

Great Britain

25-01-01

Dear Ms. Janice Galvin,

We would like to invite to the fantastic golf tournament that will take place on Saturday, 27 January, at 15:00.

Sincerely,

Annette Hill

Chapter 12

Quotation to Contacts

This chapter contains the following sections:

- Introduction
- Setting Up Customer Templates
- Making a Sales Quote from the Opportunity List Window
- Making a Sales Quote from the Sales Quote Window
- Creating a Sales Order from the Sales Quote Window
- Exercises
- Solutions

12.1 INTRODUCTION

In Navision 3.70 it is possible to create sales, purchase and service documents on the basis of a contact instead of a customer. In this way the salesperson does not need to know the customer record to create, for example, a sales document. The knowledge of the contact record is sufficient.

Also, a new customer template contains information that is necessary to create a customer from a contact record.

Information from the contact record and customer template is necessary to create quotes. If the quote is to become an order, the program will prompt you to create the customer because an order can still only be based on a customer record.

The Quotation to Contact feature allows you to:

- Issue quotes to contacts from different countries.
- Use different language codes.
- Use different General, VAT or Customers Bus. Posting Groups.
- Use different Price Group Codes.

12.2 SETTING UP CUSTOMER TEMPLATES

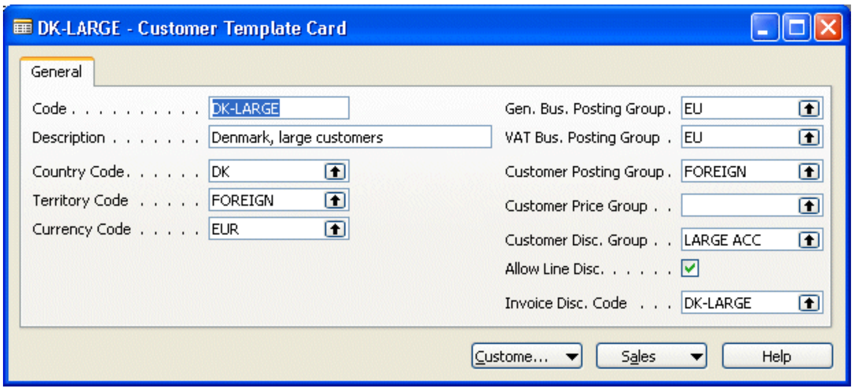
You may often have contacts or possible customers asking for quotes. These contacts or potential customers may not yet be registered as customers in the program. In order for you to make sales quotes for these requests, you should create and define one or more customer templates. You can then use the templates in the quotation phase, so that you do not have to create a customer.

You use this template to pass on information that is necessary to create a customer from a contact card.

You can set up the customer templates in the following way:

1 Click Sales & Receivables, Setup, Customer templates.

2 The Customer Template Card appears.



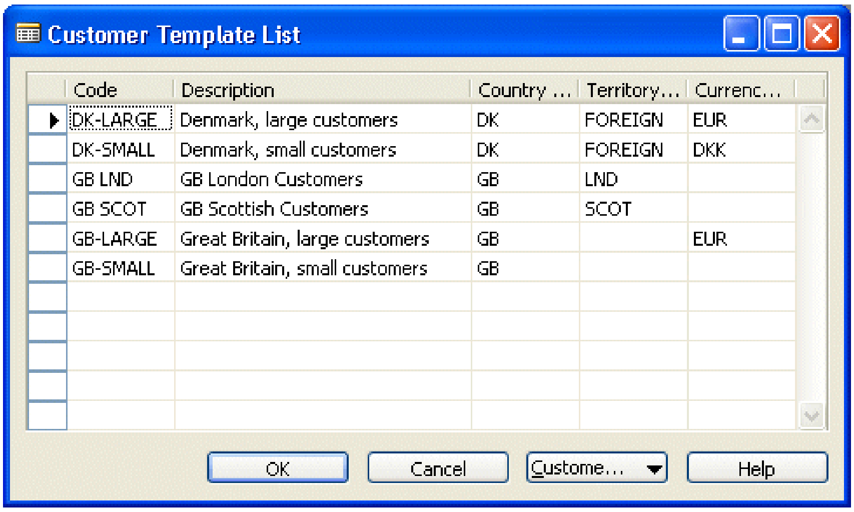
3 On the Customer Template Card on the General tab, type a **Code** and a **Description** for the customer template.

4 The other fields, such as **Country Code**, **Territory Code** and **Language Code** are used as search criteria, and could be filled in.

5 The **General Business Posting Group** and the **Customer Posting Group** fields must be filled in.

6 The remaining fields do not have to be filled in and can be filled in only if you want to specify information for these fields.

7 You have now set up the customer template. Click F3 to create another one. Click F5 to see a list of your templates.


Customer Template List
Code
Description
Country ...
Territory...
Currenc...
DK-LARGE
Denmark, large customers
DK
FOREIGN
EUR
DK-SMALL
Denmark, small customers
DK
FOREIGN
DKK
GB LND
GB London Customers
GB
LND
GB SCOT
GB Scottish Customers
GB
SCOT
GB-LARGE
Great Britain, large customers
GB
EUR
GB-SMALL
Great Britain, small customers
GB
OK
Cancel
Custome...
Help

12.3 MAKING A SALES QUOTE FROM THE OPPORTUNITY LIST WINDOW

At a certain stage of a sales cycle or when the opportunity is close to becoming a customer, you may want to make a sales quote for the contact.

When setting up sales cycles, you can specify that a quote is required when the opportunity is at a given stage.

If the contact is a customer, the program uses the customer information to create the quote.

If the contact involved in this opportunity is not yet a customer, the user can still create the quote.

In this case the program uses the most appropriate customer template otherwise or you can choose one yourself. The program uses the search criteria such as Country Code, Currency Code or Territory Code to select the contacts on the basis of the customer template.

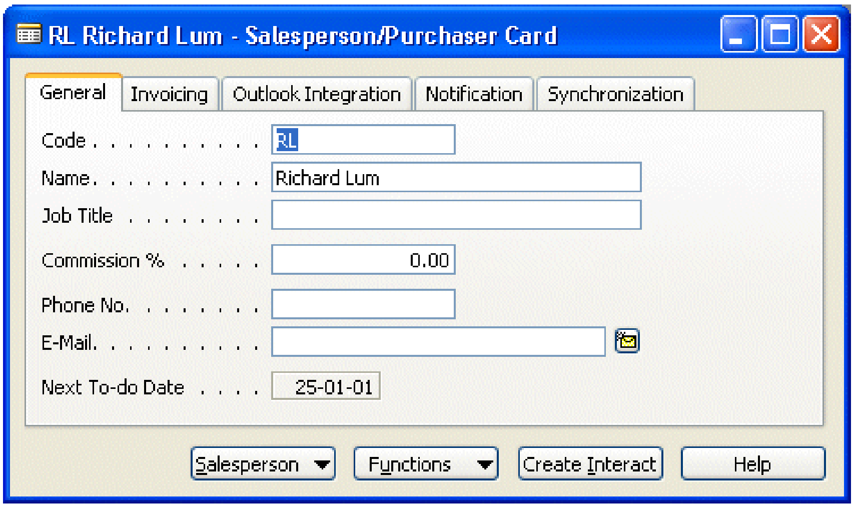
If there is more than one customer template that matches these fields, the program will prompt you to choose among them.

Note

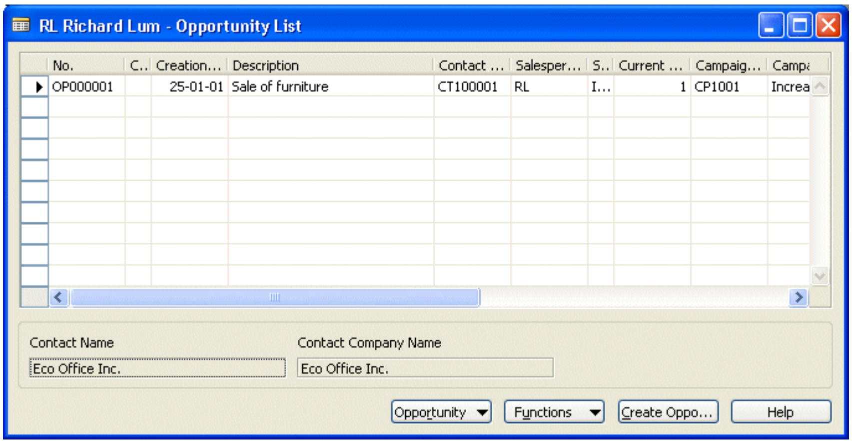
Before you can create the sales quote, a contact must be defined, the customer template must be set up, and an opportunity for the company must exist.

You create the sales quote with information from the customer template and the contact in the following way:

1 Click Relationship Management, Salespeople. The Salesperson or Purchaser Card appears. Select the Salesperson or Purchaser Card for the person for which you have created the opportunity.



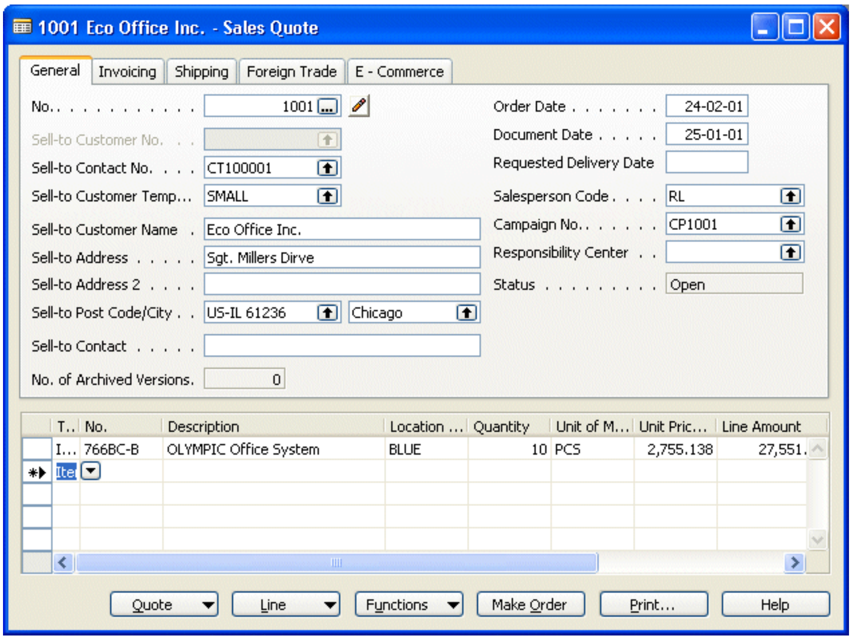
2 Click the Salesperson button and select Opportunity and the **Opportunity List** window for the sales person appears.



3 Select the relevant opportunity, and click Functions, Assign Sales Quote. A **Sales Quote** window appears.

If the company selected is registered as a customer, the program retrieves the customer information from the customer record linked to the company in question.

If the company is not a customer, and only one Customer template is in alignment with the customer, the program fills in the **Sell-to Customer** field. If more Customer templates fit the contact, you can select the relevant Customer template, by clicking the AssistButton to the right of the **Sell-to Customer Template** field.



4 Fill in the details of the **Sales Quote** window, print it and send it to the company.

12.4 Making a Sales Quote from the Sales Quote Window

It is possible to make a sales quote directly in the **Sales Quote** window for a contact that has not yet become a customer.

You should check that the information on the quote header is correct and fill in the details of your quote. When you have done that the quote is ready to be printed and sent to the contact.

It is not possible to release the quote before a customer is assigned to it, in other words, the quote is not ready to be made into an order.

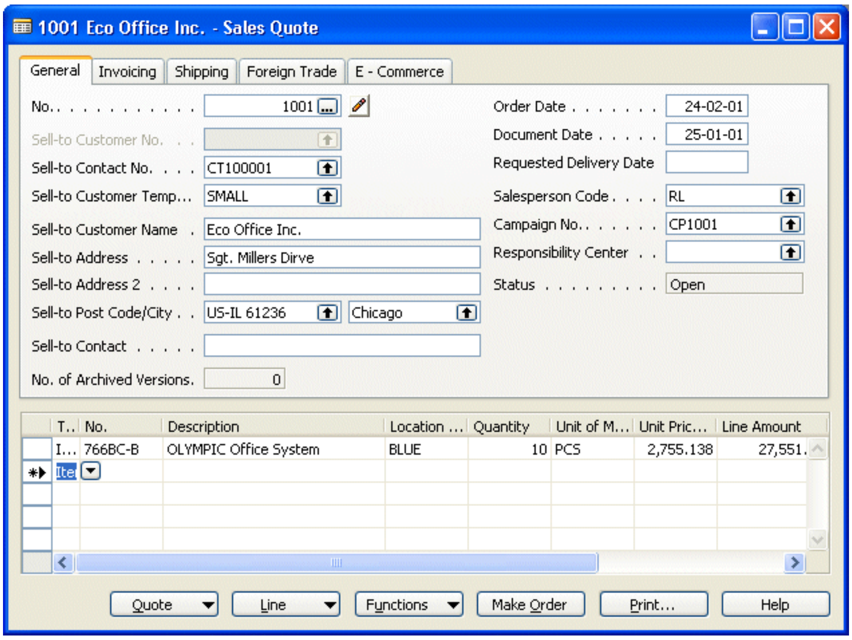
Note

Before you can make the quote, your company and the person you want to sell to must be a registered contact in the program and you should have set up a customer template.

You create the sales quote in the following way:

1 On the Contact Card, click Contact, and then select the Sales Quote, and the **Sales Quote** window appears.

2 In the **Sell-to Contact No.** field, select a company and a person you want to sell to. (These must be registered contacts in the program).



3. A matching customer template is automatically selected by the program. If more than one customer template fits this contact, click the AssistButton to the right of the **Sell-to Customer Template** field, and select the relevant customer template.

4. Fill in the details of the **Sales Quote** window, print it, and send it to the customer.

12.5 CREATING A SALES ORDER FROM THE SALES QUOTE WINDOW

When the contact is satisfied with the proposal, an order can be made.

If a sales quote has been created for this contact, you create an order directly from the quote.

If the contact is not linked to a customer record when you click Make Order, the program asks you if you want to transform the contact into a customer.

If you select *yes*, a customer is created for the contact and the quote is transformed into an order.

Note

The company for which the order is to be made must be a registered contact in the program, and you must have made a sales quote for the new customer.

You create the sales order in the following way:

1 In Relationship Management, select Contacts, and the Contact Card appears.

2 Click the Contact button, Sales Quotes and find the relevant quote.

3 Click Make Order to transform the quote into an order. The program finds that no customer is linked to this contact, and you are prompted on whether you want to create a customer now.

4 Confirm, by clicking *yes*, that you want to create a customer. A customer is created using the information from the Contact Card and information from the Customer template Card. The quote is transformed into an order.

5 Print the order and send it to the customer.

Note

If you want to release a Quote, you use the sequence described previously.

12.6 EXERCISES

Exercise 35 **Setting Up Customer Templates**

You want to set up a number of customer templates to ease the work of the salespeople. You wish to set up templates called platinum (customers), gold (customers), and silver (customers), and you are going to fill in all the relevant fields for the customer templates.

Set up the platinum (Swedish customers), gold, and silver customer templates.

Exercise 36 **Creating a Sales Quote and a Sales Order**

Richard is a Salesperson working for Cronus. One of his contacts is Kinnareds Traeindustri AB. He receives a phone call from Kinnareds Traeindustri AB that is not a customer. They want a quote on office furniture.

Kinnareds Traeindustri is a registered contact in the program. A customer template for Swedish customers has been set up. (See Exercise 28).

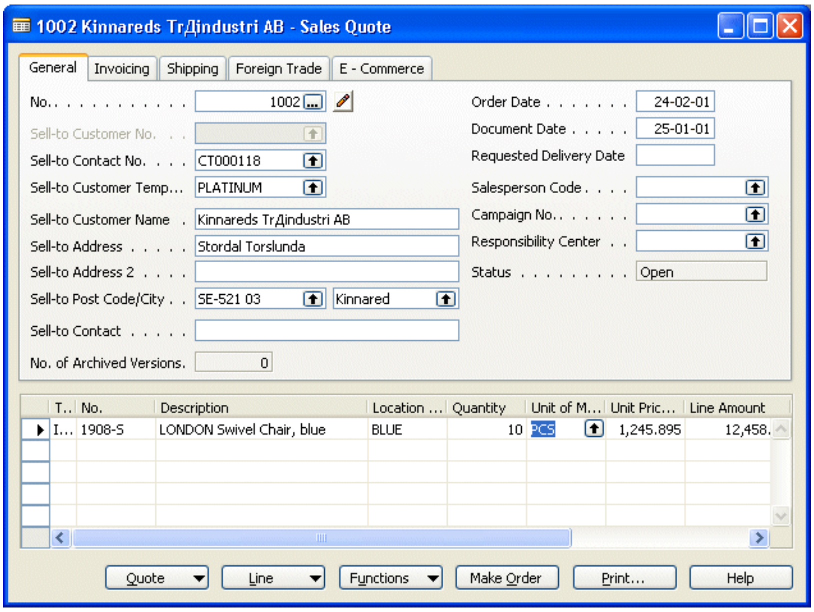
1. Make a sales quote for Kinnareds Traeindustri. Make sure that the correct customer template is used.
2. Fill in the sales quote, print it and send it to Kinnareds Traeindustri.
3. Create a sales order on the basis of the previous sales quote.

12.7 SOLUTIONS

Exercise 35

If you have set up the customer templates from Exercise 28 correctly, you will get a window display similar to this.

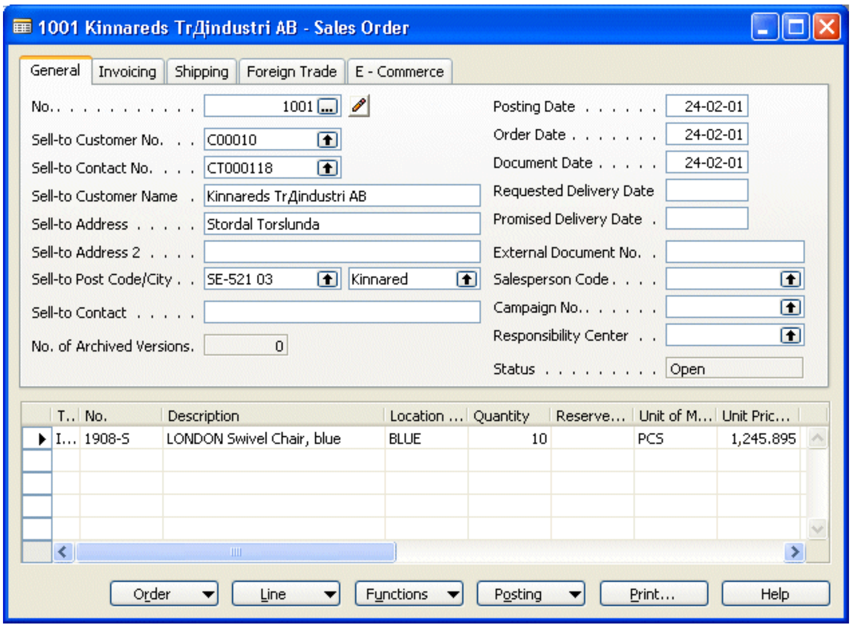
Exercise 36.1



This window shows the sales quote using the correct customer template. Click Print to print the sales quote.

Exercise 36.3

In order to make an order from the above quote, click Make Order. You are prompted by the program to specify a customer on the quote. Click *Yes*, if prompted and the contact is changed to customer and the order is made.



Chapter 13

Document Logging

This chapter explains how to log and archive sales, purchase, and service documents while going through the sales or purchase process. This can be used to see the history of the sales process.

This chapter contains the following sections:

- Introduction
- Saving a Sales Quote
- Restoring a Sales Quote or Order
- Logging and Saving a Version of a Sales Order
- Restoring a Sales Order
- Exercises
- Solutions

13.1 INTRODUCTION

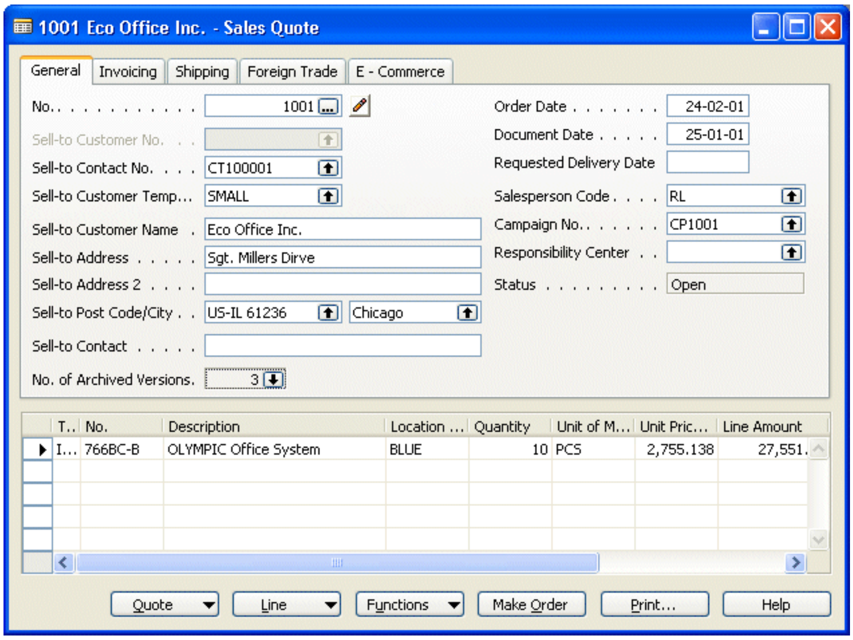
In the current release of Navision 3.70, the sales, purchase, and service documents are logged. This means that when you go through the sales and purchase process, and the documents change their nature, for example from a quote to an order, you have the possibility to save and log the documents.

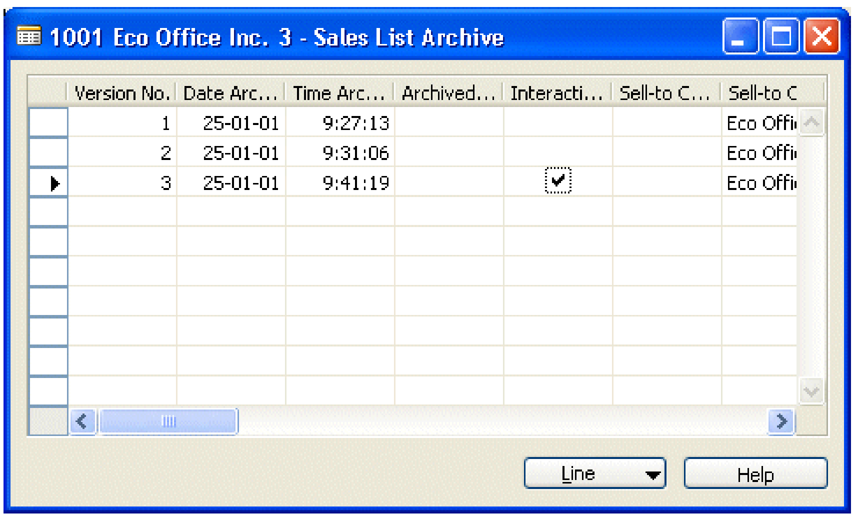
This means that you can always go back to a previous version if the quote or order has been changed during the sales process.

13.2 Saving a Sales Quote

In order to keep track of the sales process, it is convenient to save versions of previous quotes. This can be done in the **Sales Quote** window (in Sales & Receivables, Quotes) on the Functions tab by clicking Functions, Archive Document.

When you select this, you archive a copy of the sales quote in the archive file. If you want to revert to any archived copies, you click the AssistButton to the right of the **No. of Archived Versions** field, and the **Sales List Archive** window appears.



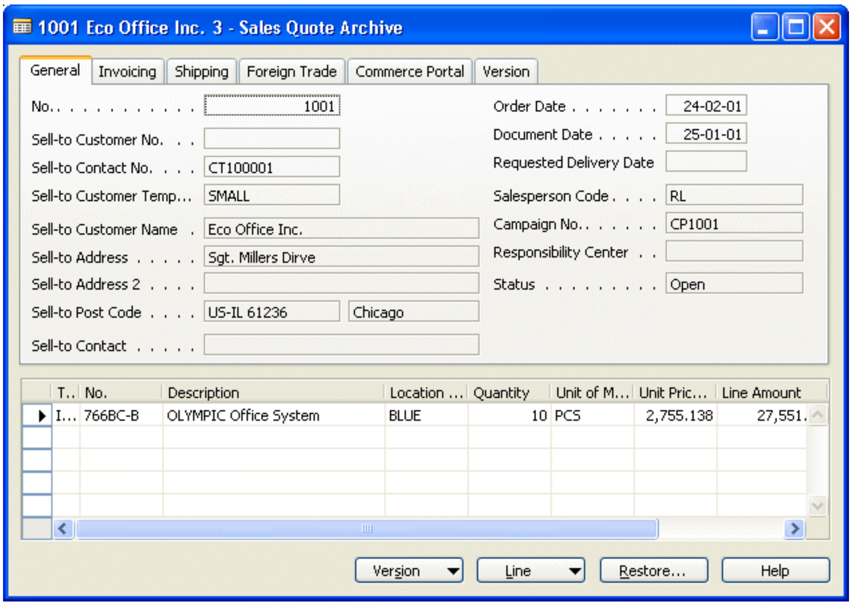


Note

The figure in the **No. of Archived Versions** field indicates how many archived versions there are.

If you want to look at any of the archived versions, select the version you want to look at, and click Line, Card, and the **Sales Quote Archive** window appears.

You can then restore any one of the archived versions, by clicking the restore button, and clicking *Yes* in the dialogue box that appears.



If you want to print the quote in order to check it, click Print in the **Sales Quote** window. On the Options tab, deselect the Log Interaction Option, because you do not wish to make any kind of interaction with the customer.

You can see the Archive File by clicking the AssistButton to the right of the **No. of Archived Version** field.

13.3 Restoring a Sales Quote

You can restore an order created on the basis of a previous version of a sales quote. You can do this in two different ways:

Restoring a Sales Quote from the Contact Card

1 In Relationship Management, click Contacts, and then select the Contact Card you want to view.

2 Click Contact, and select **Interaction Log Entries.** The **Interaction Log Entries** window appears.

3 Select the interaction log entry for the quote that you want to look at and Click Show, and the saved version of the document appears.

4 Click Version, List to see a list of versions for this sales quote.

5 Select the relevant version, and click OK. The saved version appears. You can now click Restore, and click *Yes* in the dialogue box that appears. Now the quote has been restored.

6 Click esc to go back to the Contact Card.

7 Click Contact and select the Sales Quote to view the restored quote version.

8 If you want to make the order, click Make Order. Now the order has been created on the basis of the restored, archived document.

Restoring a Sales Quote from the Quote Itself

1 In Sales & Receivables, click Quotes.

2 Find the relevant quote.

3 Click the AssistButton in the **No. of Archived Versions** field, and a list of the archived versions appears.

4 Select the version you want to look at, and click Line, Card.

5 Click Restore, and the quote has been restored.

1 If you want to make the order, click Make Order. Now the order has been created.

13.4 Logging and Saving a Version of a Sales Order

When you have sent an order for confirmation, the program should be able to log this document and save a copy for future references. This will enable you to track all versions of orders so far sent to the customer as a reference.

You do this in the same way as you have just done for quotes.

If you want to send the order to the customer, you click Print, and confirm that you have placed a checkmark in both the **Archive Document** field and the **Log Interaction** field. When you do this, you both archive the order and create an interaction log for the customer.

13.5 RESTORING A SALES ORDER

If the customer wants an order on the basis of a previous version of the sales order, you can restore it.

You do this in the following way:

Restoring a Sales Order

1. In the Contact Card, click Contact, Customer/Vendor/Bank Acc. to open the Customer Card of this contact.
2. Click Sales, Orders. The **Sales Order** window appears.
3. Click the AssistButton on the **No. of Archived Versions** field, and a list of the archived versions appears.
4. Select the version you want to look at, and click Line, Card.
5. Click Restore, and the order has been restored.
6. Print the order and send it to the customer.

13.6 EXERCISES

Exercise 37 **Issuing a Quote to Contact**

You have received a phone call from Ergonomic Office System requesting a quote for office furniture.

1 Create a sales quote for *Ergonomic Office System*.

2 Fill in the details of the quote using the item *Olympic Office System*.

3 Send it by fax to the Ergonomic Office System and make sure that you create the log entry and save a copy of the quote in Navision.

Exercise 38 **Restoring the Quote**

Two days later the Purchase Manager from Ergonomic Office System calls and requests changes to the quote. He now wants to have two more items on the quote.

1 Open the quote and change it to fit the new request.

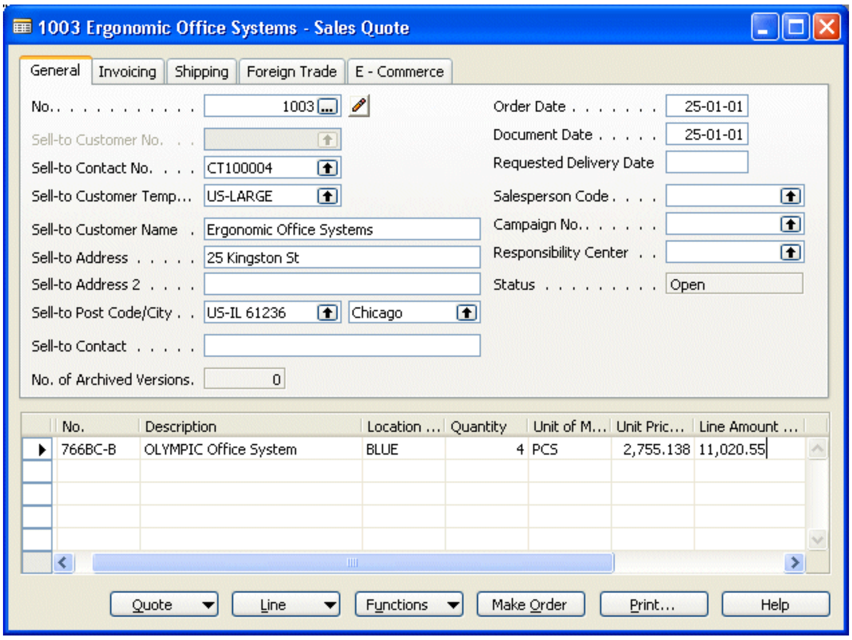
2 Send the new quote with changes for confirmation and save a copy.

Three weeks later, the Purchase Manager decides to place an order based on a previous quote.

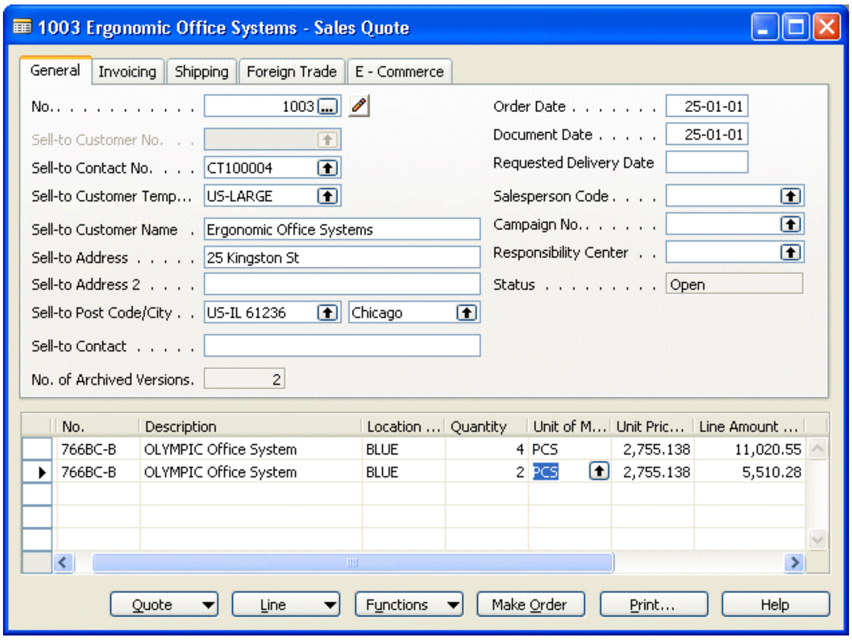
1 Restore the previous quote.

2 Make the order from this quote.

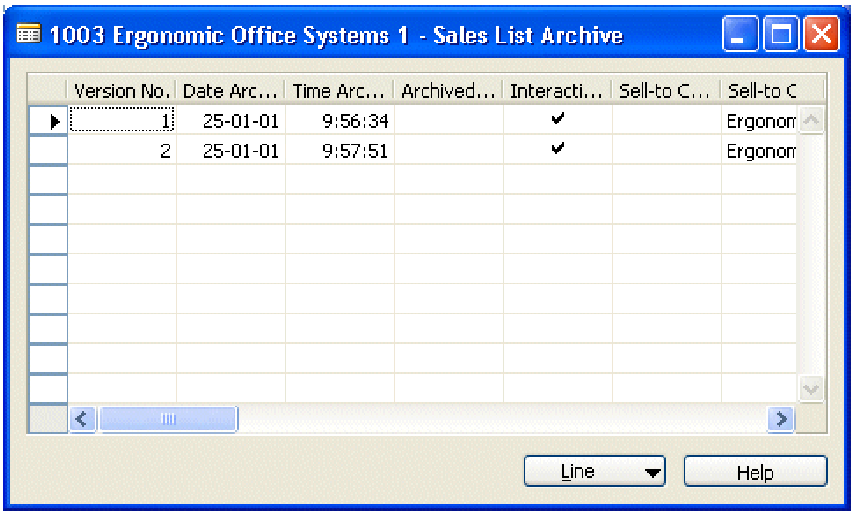
13.7 SOLUTIONS



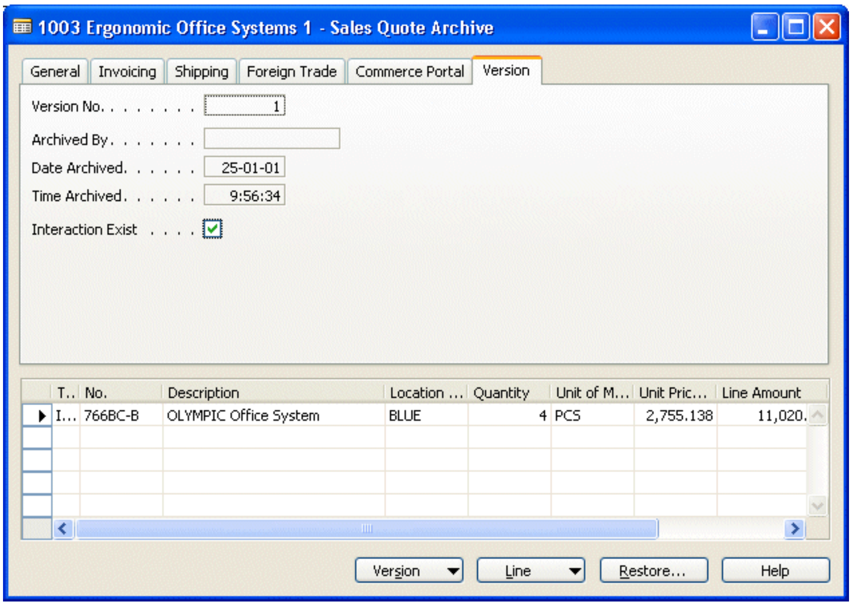
A sales quote has been created.



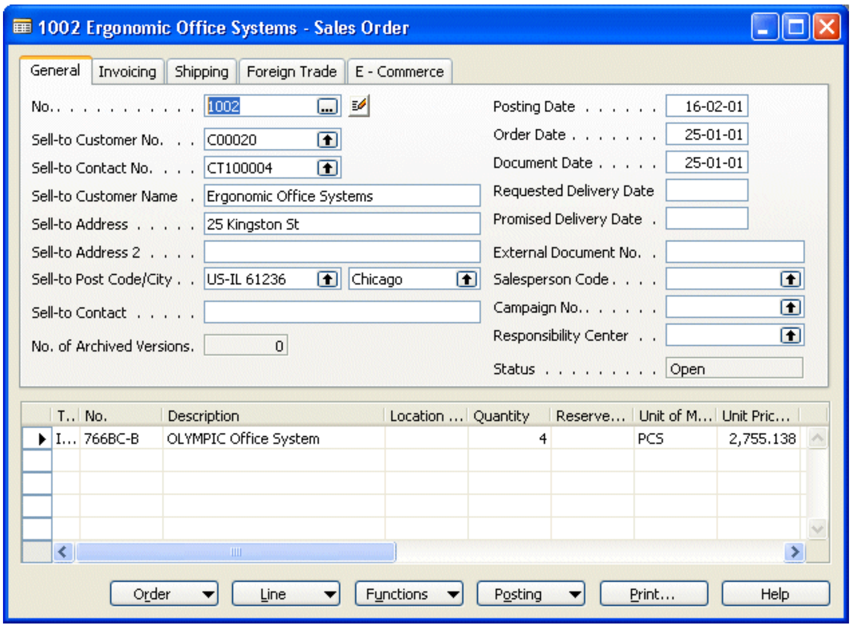
The sales quote has been changed.



The **Sales List Archive** window contains two sales quotes.



The first sales quote has been restored.



A sales order has been created on the basis of the restored sales quote.

Appendix A.

Course Schedule

This appendix contains contains a course schedule, which suggests the order in which the chapters should be taught.

We recommend that the course be taught over a period of three days.

DAILY SCHEDULE

Day One		Welcome
	Chapter 1	Introduction
	Chapter 2	Customer Relationship Management
	Chapter 3	Relationship Management Setup
	Chapter 4	Contacts
	Chapter 5	Interactions and Document Management
Day Two	Chapter 6	Campaigns and Segmentation
	Chapter 7	Task Management
	Chapter 8	Outlook Integration
	Chapter 9	Opportunity Management
	Chapter 10	Profiling and Classification
Day Three	Chapter 11	Multilanguage Salutation and Attachment
	Chapter 12	Quotation to Contacts
	Chapter 13	Document Logging

Appendix B.

Terminology List

This appendix contains the terminology list for the Relationship Management application area.

activity

A larger task that is made up of a sequence of to-dos.

The to-dos within an activity are all linked to each other by a date formula, and are assigned to the responsible salesperson.

business relation

The mode or kind of professional connection between your company and the company you interact with.

campaign

All the actions (and interactions) taken in order to reach specific marketing or sales goals.

campaign entry

The record of one interaction with a contact or a group of contacts that is made as part of a campaign.

company

An entity that interacts with your company, for example, a customer, vendor, bank, law firm, consultancy.

contact

A company or a person that has relations with your company's environment.

cover sheet

A letter that accompanies another letter or package addressed to a contact.

industry group

A group of companies that produce or supply the same or similar products or service.

interaction

The communication between your company and a contact, for example, by letter, fax, e-mail, telephone, meeting.

interaction group

A group of interactions that have the same characteristics.

interaction log

A record of all the interactions (for example, phone calls and letters) relating to a particular contact, salesperson, campaign and/or to-do.

interaction template

A model defining the basic characteristics of an interaction that can be used as a basis to create new interactions.

mailing group

A group of contacts (companies or persons) to whom you send the same information or message.

opportunity

A possibility for a salesperson to sell to a contact.

profile

A list of the most noteworthy characteristics of a contact.

Profiles are mainly used to segment contacts and deal with them in a personalized way.

reduce

To remove contacts from a segment by defining the part that you want to take away from the segment.

refine

To remove contacts from a segment by defining the part that you want to keep in the segment.

sales cycle

A sequence of stages that a salesperson can define and/or select according to the type of sales opportunity, and that they can use to manage the sales process.

segment

A group of contacts selected according to certain characteristics.

to-do

A specific task assigned to a salesperson or team that is directed at a contact or segment and/or is part of a campaign.

Appendix C.

Class Project

This appendix contains the class project for the Relationship Management course.

CLASS PROJECT

Introduction

The demo company, Cronus Inc., has invented a new bicycle called Millennium Bike.

In order to promote this new product, Cronus Inc. has decided to participate in a trade show, “Sport Futurus,” which is taking place in London. By attending the trade show, Cronus Inc. hopes to attract new leads that will increase Millennium Bike sales.

As part of the scenario, you will take on the roles of three different employees at Cronus Inc:

- Jane Sanders - marketing employee
- Mark Brown - salesperson
- Mary Lou - the sales and marketing manager

In completing this class project, you will be practicing the following:

- Setting up a campaign
- Profiling
- Segmenting
- Classification
- Opportunity management

SETTING UP A CAMPAIGN

Scenario 1:

As Jane Sanders, working in the marketing department, five weeks ago you set up the campaign for taking part in the trade show and you assigned the appropriate to-dos. (Note: Some of the to-dos in this scenario have already taken place.)

Tasks:

Set up the campaign using the following information:

Description: *Millennium Bike Tradeshow Futurus*

Status Code: *Started.*

Starting date: *5 weeks ago (from today's date)*

Ending date: *four months later*

Salesperson: *Empty*

Assign the following to-dos that make up the campaign to the sales team, using any contact number and giving the to-dos the priority *normal*:

***Type**: blank* ***Description**: Send invitations to the trade show*
***Date**: 5 weeks ago*

***Type**: meeting* ***Description**: Talk to the trade show organizers*
***Date**: 4 weeks ago*

***Type**: blank* ***Description**: Make sure marketing material is available*
***Date**: 3 weeks ago*

***Type**: blank* ***Description**: Arrange staff for the booth*
***Date**: 2 weeks ago*

***Type**: blank* ***Description**: Attend the trade show*
***Date**: 2 days ago*

***Type**: blank* ***Description**: Register contacts from the trade show*
***Date**: 2 weeks after the trade show*

***Type**: blank* ***Description**: Send thank-you letter to visitors at the show*

***Date**: 2 weeks after the trade show*

***Type**: phone call* ***Description**: Call the recipients of the letter*
***Date**: 4 weeks after the tradeshow*

- Close the first four to-dos to show that these have already taken place.
- Enter a new salesperson: Mark Brown.
- Create a list of the following to-dos for Mark Brown:

Call the recipients of the letter

Presentation to the Sport & Leisure club

Invitation to Spain

PROFILING

Scenario 2:

You have returned from the tradeshow and now have some tasks to complete as a result.

Tasks:

- Close the fifth to-do "Attending the tradeshow."
- Set up a new job responsibility for Procurement Manager.
- Use the information from the business cards that you received from the visitors at your stand to register the following contacts:

Company Name	*Name*	*Address*	*Post code*	*City*	*Job Title*
Eastern BIKE Power	*John Wattson*	*2 Roehampton Lane*	*GB-NE21 3YG*	*Newcastle*	*Marketing Manager*
National Racing Club	*Stuart Morrisson*	*15 Capston Hall*	*GB-N12 5XY*	*London*	*Procurement Manager*
Bikers Club	*James Wondersom*	*13 Richmond Park*	*GB-WD6 9HY*	*Borehamwood*	*Sales Assistant*
Bikers Move Ltd.	*Eva Washington*	*8 Nottingham Lane*	*GB-SA3 7HI*	*Stratford*	*Procurement Manager*
Runners Ltd.	*Gordon Smith*	*25 Sea Lane*	*GB-PL14 5GB*	*Plymouth*	*Marketing Assistant*
General Sports Equipment Inc.	*Isabelle Smith*	*4 Old Farm Road*	*GB-EH16 8JS*	*Edinburgh*	*Procurement Manager*

Note

- The e-mail address of Isabelle Smith is: issm@tralala.co.uk
- Assign these contacts to this mailing group: Futurus Sports.
- Add Cycling to the profile question regarding hobbies.
- Record the personal profiles for some of your new contacts.

SEGMENTING

Scenario 3:

You have decided to send the visitors at the trade show a thank-you letter.

Tasks:

- Create the thank-you letter (see the example at the end of this appendix).
- Create an interaction template and attach the letter. Remember to insert the following merge fields: Contact_Mail_Address, Document_Date, Contact_Salutation, Contact_Name, SalespersonPurchaser_Name and SalespersonPurchaser_Job_Title.
- Create a segment made up of the visitors at the trade show. Remember to save the criteria.
- You realize that your segment doesn’t include Lance Legstrong. Set him up as a contact, assign him to the mailing group you set up for the trade show visitors and reuse the segment criteria to add him to your segment.
- Personalize the letter to Mr Legstrong by congratulating him on the merger.
- Ensure that Ms Smith receives her letters by e-mail.
- Log the segment and create a follow-up segment.

OPPORTUNITY MANAGEMENT

Scenario 4:

You are now Mark Brown, one of the sales representatives of Cronus Inc. You start your day by checking your to-do list.

Tasks:

- One of the first tasks is to call the recipients of the “Thank-you letter”. Use the wizard to make and log the phone call.

- During his telephone conversation, Mr. Legstrong asks to be sent a quote for two Millennium bikes by fax. He seems to be very interested in buying the Millennium bike. Create this as an opportunity. The deal could be worth 8000 LCY and you think there is an 80 percent chance of it succeeding.

- Record this interaction.

Scenario 5:

You are now Mary Lou, the Sales and Marketing Manager of Cronus Inc. You have just come back from a management meeting where you have been asked to identify how much the company can expect to sell within the next few months. You were also asked to identify the most important customers of Cronus Inc. and invite them to an all-expenses-paid trip to Spain.

Tasks:

- Use filters to view the opportunities for all the salespeople over the next months.

- Create a segment comprising of your top 10% of customers (according to how much they have bought from you), and refine it to include only those contacts working in the Procurement department.

Dear

We would like to thank you for coming to see us at the Sport FUTURUS show, earlier this week. It was a pleasure to meet you. Once again, we have been delighted by the number of old friends and ‘new faces’ to visit the stand. We hope you enjoyed your time with us, exploring our new production of the Millennium Bike.

I would very much welcome the opportunity to meet with you once again to discuss in more detail how the new production could become a part of your product portfolio or how we could assist you in marketing the new series of Millennium Bike.

If you would like to phone our office on 234-432-432, I will be happy to arrange a time and place to suit you, or if you prefer to find out a little more about us first, why not visit our website, at www.cronus-co.uk

We look forward to hearing from you in the near future.

Yours sincerely