CHAPTER 7: OTHER FUNCTIONAL AREAS

- Overview
- Marketing
- Resource Planning
- Service Management
- Human Resources
- Business Notification
- eCommerce

Overview

In this section, you obtain an overview of marketing, jobs, resources, service management, human resources, business notification, and eCommerce. More detailed information on these features in the program will be discussed in later courses.

Marketing

Marketing is a powerful sales tools developed for companies with sales and marketing teams. This tool is also integrated with Microsoft® Outlook®.

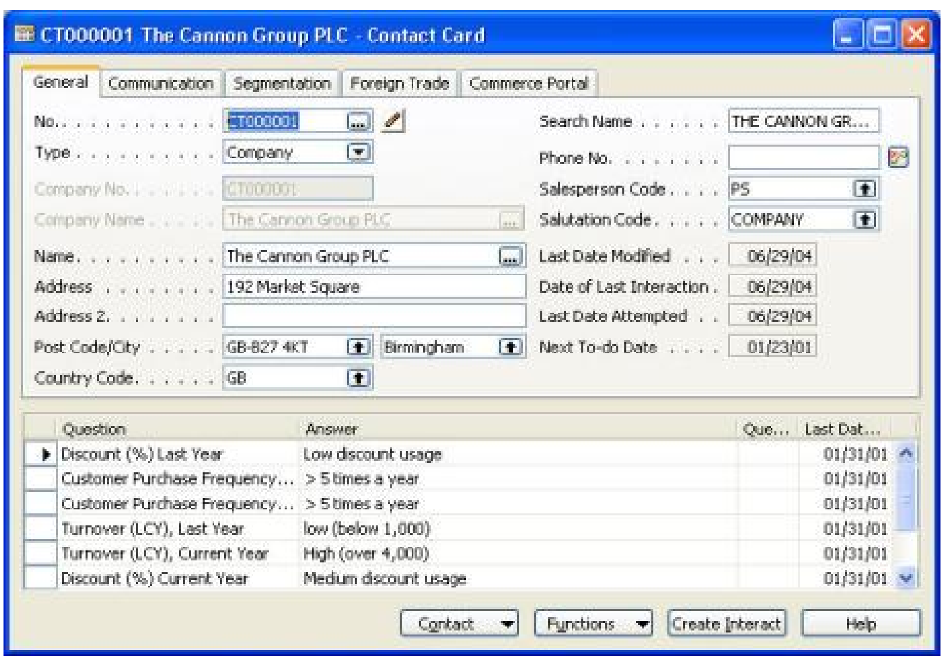
The Marketing application area gives the user complete and accurate information to improve the quality of every business interaction with a Contact.

Contact Management

With Contact Management, you can maintain an overview of your contacts and record your contact information for all your business relations. For each contact you can specify the individual contact people you have at the contact company. Duplicate check automatically alerts you if you enter contact information that already exists. You can categorize your contacts based on your own profiling criteria. Contact Management allows you to personalize your approach to your contacts.

You use the contact card to record information about your contacts. Microsoft® Business Solutions–Navision® is integrated with Microsoft TAPI (Telephony Application Programming Interface). By using TAPI compliant telecom devices, you can call a contact simply by clicking a button on the Communication tab on the contact card (the small telephone icon next to the telephone or mobile phone number).

Contacts are tightly integrated with the Sales application area. This means that, for example, you can issue quotes to prospects or create sales documents for specific contact persons. To view the contact card, on the Sales & Marketing menu, click MARKETING→CONTACTS. The Contact Card window appears:



Contact Search

The Contact Search feature allows you to find a contact in the database even if you cannot remember the exact details of the contact. You can misspell a search string and find the contact you are looking for. This feature is available not only from the Sales & Marketing menu (under Marketing) but also from wizards, the contact list and the contact card.

To limit the search, you can search across different fields (for example, Name, Address, Telephone No. and E-Mail Address) and tables (Contact**,** Interaction Log Entry**,** To-do**,** Opportunity**,** Rlshp. Mgt. Comment Line), or you can search across all tables.

Task Management

With Task Management you can organize your campaign, marketing and sales tasks. You can create to-do lists for yourself. To-dos can be linked to contacts and/or campaigns. You can assign tasks, composed of several to-dos, to other users or teams of users recorded in the program. Activities can be composed from several to-dos.

The No. of To-dos window allows you to view existing to-dos in a number of ways. For example you can choose to view the number of to-dos or the contact number involved, grouped by campaign, salesperson, team, or contact. To open the window, on the Sales & Marketing menu, click MARKETING→TO-DOS.

Contact Classification

Contact Classification classifies your customers based on criteria specified by you, for example, to group contacts in terms of revenue. This feature provides crucial information for campaign planning, for targeting your contacts more specifically and for streamlining your sales and marketing messages.

A contact rating system is provided to let you set up specifically tailored ratings reflecting, for example, the importance or loyalty of your customers, vendors and partners. You can have the ratings displayed on the contact card for quick reference and update.

Campaign Management

Campaign Management allows you to organize campaigns based on market segments you create yourself. You can segment your contacts based on specific criteria, such as, sales, contact profiles and interactions.

You can 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.

You can mail merge the identified segment with a Microsoft® Word document or send any other file type to the contacts in your segment. You can send copies of the same document to people of different nationalities each in their native language.

Information about a campaign is entered on the campaign card. To open the Campaign Card window, on the Sales & Marketing menu, click MARKETING→CAMPAIGNS.

Document Management & Interaction Log

You can 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 Document Management helps you keep track of the document in question.

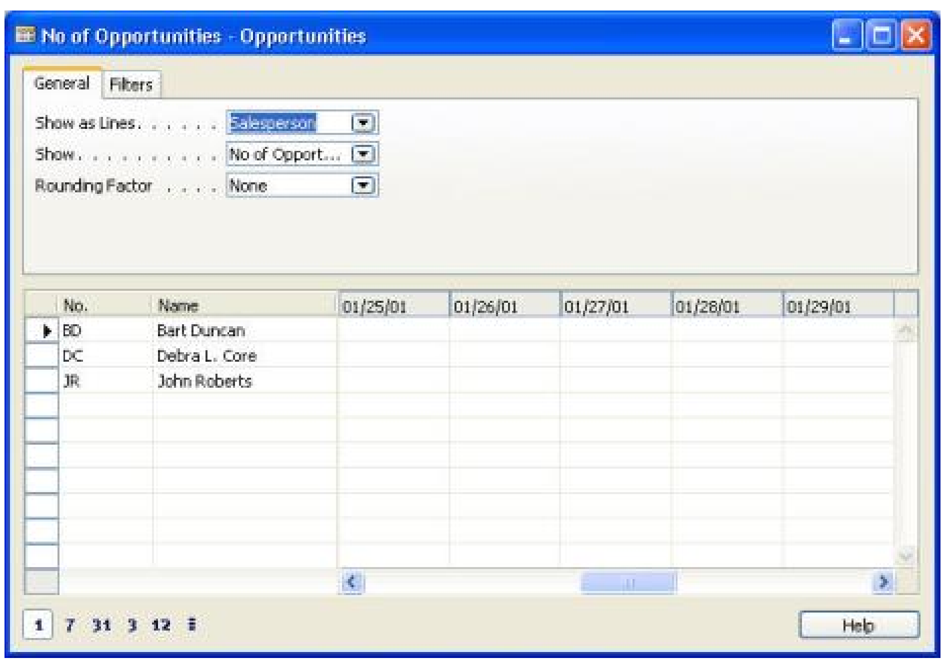
Microsoft Navision documents that you send to your contact, such as sales orders or quotes, can be logged and retrieved to be used at a later stage. You get an accurate and up-to-date account of all your interactions with the contact.

Opportunity Management

With Opportunity Management you can keep track of sales opportunities. Salespeople have an overview of what is in the pipeline and can plan ahead accordingly.

Opportunity Management helps you divide your sales process into different stages. You can view existing opportunities in the Opportunities window**.** The Opportunities window allows you to view existing opportunities in a number of ways. For example you can choose to view the number of opportunities or the value of the opportunities (calculated in a variety of ways), grouped by campaign, salesperson, or contact.

On the Sales & Marketing menu, click SALES→OPPORTUNITIES. The Opportunities window appears:



Outlook Client Integration

Most Sales & Marketing users build relationships with their contacts using calendar and task management tools, and much of the external communication takes place through Microsoft® Outlook®. Therefore integration between Microsoft Navision and Outlook is vital to the CRM user's performance.

With the Outlook Client Integration feature you can schedule meetings in Outlook and see the to-dos in Microsoft Navision before the meeting, and when the meeting has taken place, you can log it in the Interaction Log Entries window as an interaction. The scheduling capabilities in Outlook allow you to plan and execute to-dos you have been assigned, and in Microsoft Navision you can create activities for customers and contact persons.

Whenever information (for example, a to-do or a contact) is entered in Microsoft Navision, this information is automatically updated in Outlook. There is no need to update the same information twice in two different applications.

E-Mail Logging for Microsoft Exchange

This feature integrates Microsoft Navision with the Microsoft Outlook e-mail service. All your e-mail correspondence, both inbound and outbound, can be logged automatically or manually in Microsoft Navision and can therefore be shared with your colleagues to ensure that they have instant access to the latest communications with business contacts.

This solution is server-based and requires Microsoft Exchange Server. Making the solution server-based ensures that e-mails are kept in their natural environment instead of lowering performance by storing the e-mails on the application server. The integration with Outlook further allows you to use the built-in features in Outlook. For example, you can set up rules in Outlook that direct certain types of e-mail to specific folders for subsequent, automatic logging in Microsoft Navision.

Resource Planning

The Jobs & Resources functionality within Microsoft Navision is contained within the Resource Planning application area. For this section, all paths to access functionality will begin in the Resource Planning menu unless otherwise stated.

Jobs

You use the Jobs application area for detailed planning and management of the costing for any long-term job or project activity. You can also use it for many types of services and consultancy tasks.

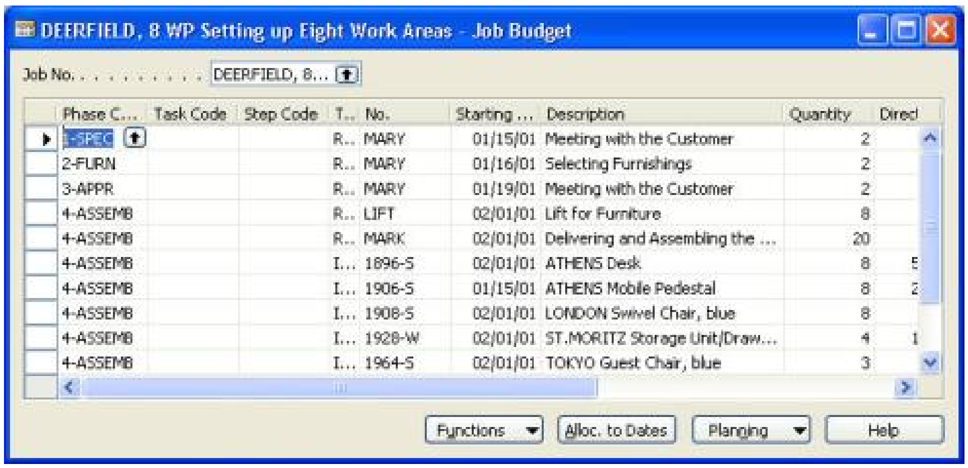
Successful Job management requires an up-to-date overview, detailed planning and the ability to carry out follow-up analysis using objective data.

This application area contains all the features that are used with a company's job and project management. For example, Job cards, job budgets, job journals, as well as reports and registers related to resources.

Job Budgets

You use the Job Budget window to set up a budget for a job. You can set up a budget for each job. The budget is used to plan the resources you allocate to a job.

The budget can be either very general with few entries or it can contain more entries that are divided into activity levels. On the Resource Planning menu, click JOBS→BUDGETS to view the job budgets.



Job Journals

You can use the job journals to:

- Post job usage of resources, items and general ledger resources.
- Apply job ledger and item ledger entries.
- Assign entries to phases, tasks, and steps.
- Reconcile resources.

On the Resource Planning menu, click JOBS→JOB JOURNALS to view the job journals.

Job Sales

Integration with the Sales & Marketing application area allows you to perform job sales. All job sales must be posted on a Sales Invoice.

Resources

With the Resources application area, you define resources, which can either be personnel or machines. You may link the individual resources to resource groups.

This functionality contains all the features that are used with a company's resource management: Individual resources, resource groups, capacity planning, resource journals, as well as reports and registers related to resources.

Resources functionality is a powerful tool for optimal management of personnel and/or machines.

Resource Cards

You set up new resources on resource cards.

To view the resource cards, on the Resource Planning menu, click **Resources**. The Resource Card window appears:

Resource Groups

You can work with resources as individual entities or as groups. Any number of resources can be assigned to a resource group.

Resource Capacity

You may need to increase the capacity of resources (for example, technicians) regularly over a period.

A resource's capacity indicates how much of the resource is available in a specified period.

You can assign or modify capacities to your individual resources or to resource groups. For example, for employees you might want to enter the available man-hours. For machines, you could enter the production capacity for a time frame. It is possible to enter capacity by day, week, month, quarter, year, or accounting period. You can record resource capacities in the Resource Capacity window. To view it, on the Resource Planning menu, click **Resource Capacity**.

Allocating Resources to Jobs

You can allocate a resource or a resource group's capacity to one or several jobs. You can do this either from the Resources application area or the Jobs application area.

You use the Resource Allocated per Job window to view and change the amounts of measuring units for resources allocated to the various jobs in different time periods. To view the window, go to the Resource Capacity window and click PLANNING→RESOURCE ALLOCATED PER JOB.

Resource Availability

The Resource Availability window shows a scrollable summary of resource capacities. The window is divided into lines showing the entire capacity, the quantity allocated to jobs on order, the capacity assigned to jobs on quote, the availability after order and the remaining capacity after all jobs on quote or order. To open the window from the resource card, click PLANNING→RESOURCE AVAILABILITY.

Resource and Job Integration

The Resources application area and the Jobs application area are integrated, so you can allocate the capacity of a resource or a resource group to one or several jobs.

Resource Journals

The Resource Journals feature enables you to keep track of your use of resources and their profitability.

You can post usage and sales of your resources in the resource journal, and you can generate statistics from this information for internal management purposes. To see a Resource journal, click **Resource Journals**.

Resource Statistics

You can see all of the transactions recorded in job journals, resource journals or (with some limitations) sales documents in the Resource Statistics window. To open the window from the resource card, click the RESOURCE→STATISTICS.

Service Management

Service Management makes it profitable for you to deliver superior customer service. It helps you take customer satisfaction one step further and exceed your customers' expectations. You can:

- Quickly and easily access customer service history.
- Anticipate customer needs.
- Maintain real-time records, such as the date, time and technician assigned to each customer order.

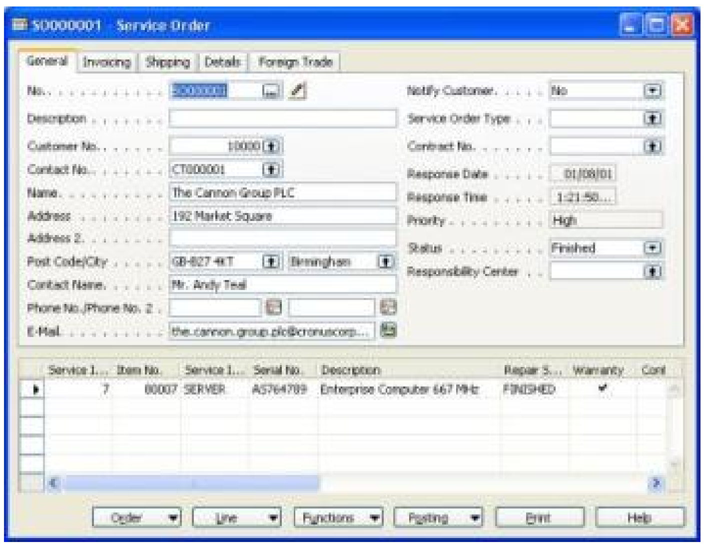
In this section, all references to accessing functional areas will begin in the Service main menu unless otherwise stated.

Service Order Management

You can register after-sales issues including service requests, services due, service orders, and repair requests. Service requests can be initiated (by customers or automatically), according to the terms stipulated in a service contract.

Critical data in service order handling can be entered from a call-center or repair shop. You can register ad hoc or one-off service orders. You can access complete service order history, service order quotes and loaner management through the Service Order Log. You create a service order in the Service Order window.

To open the window, on the Service menu, click ORDER PROCESSING→ORDERS. The Service Order window appears:



Service Price Management

Having a well thought-out service price strategy is one of the means companies use to gain an overview and control of the costs involved in providing service, and to eventually increase the profitability of their service operations. The service price management feature in Service Management gives companies an effective tool to support their service price strategy, whether it is simple or complex.

Service price management allows the setup of service price groups to take into consideration the service item (or service item group) as well as the type of fault the service task involves. Service price groups can be set up for a limited period of time, and/or for a specific customer or currency. Price calculation structures can be used as templates to assign a price to a service task. For example, this makes it possible to assign specific items included in the service price as well as the type of work included. And to ensure that the right prices are applied, it is possible to assign fixed, minimum, or maximum prices, depending on agreements with customers. Service price group statistics allow you to keep track of the profitability of each service price group.

Service Item Management

With Service Item Management you can create a database for all your service items and parts, including contract information, component management, reference to the Bill of Materials, and warranty information.

You can access the Service Level Agreement for information on, for example, response times.

You can register all items and spare parts with serial numbers as well as any replacement equipment technicians may use, and then link them to the Service Item Log. You can track all spare parts and equipment. You can access key business indicators on service items in the Trendscape Analysis feature.

You keep track of service item information on the service item card.

To open the window, on the Service menu, click ORDER PROCESSING→SERVICE ITEMS. The Service Items window appears.

Service Contract Management

With service contracts you can set up an agreement with the customer concerning the service level to be delivered. You can access information on contract history, contract renewal, and contract templates in Contract Management.

Service contracts give you the option to record details on service levels, response times, and discount levels as well as the service history of each contract, including used service items and parts and man-hours.

With Contract Management you can enable flexible invoicing, contract profitability measurement, and contract quotes. You set up service contracts in the Service Contract window.

To open the window, on the Service menu, click ORDER CONTRACT MANAGEMENT→CONTRACTS. The Service Contracts window appears.

Planning and Dispatching

You can assign personnel to work orders with Planning and Dispatching. It also allows you to log details such as work order status. Service personnel and field technicians can be filtered according to availability and skills. You can gain an overview of service task prioritization, service loads, and task escalations.

Job Scheduling

With Job Scheduling, you can automate service-oriented tasks, for example, generate preventative service orders, service contract renewals or service contract invoicing. You can also set up Job Scheduler to perform automatic checks on whether there are any batches to be processed on a specific date.

You set up job scheduling in the Job Scheduler Setup window. To open the window, on the Administration menu, click APPLICATION SETUP→JOB SCHEDULER→JOB SCHEDULER SETUP. The Job Scheduler Setup window appears.

Human Resources

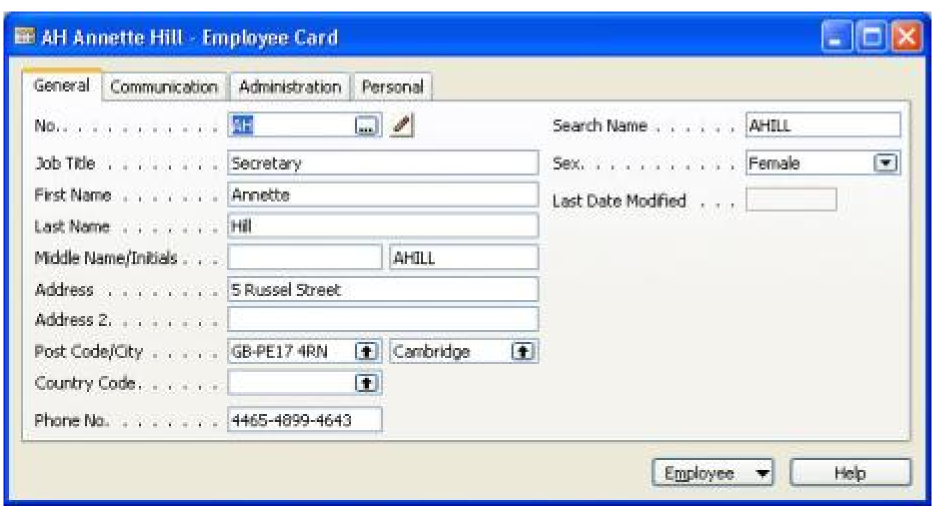
Human Resources is a fully integrated application area that enables you to register and update personnel information about employees effectively. This application area includes all the features that are used in the human resources department of a company: Employee cards, absence registration, and reports related to employees.

This makes personnel management more effective through the optimal use of employee data.

In this section, all paths to functional areas will begin in the Human Resources main menu unless otherwise stated.

Employees

Use the employee card to register all employee information. To view the window, click **Employees**:



Absence Registration

Absence codes help you keep track of the absences of employees and the cause of the absences. To open the Absence Registration window, click **Absence Registration**.

Grounds for Termination

Use the Grounds for Termination window to set up reasons that employees might leave the company. To open the window, click SETUP→GROUNDS FOR TERMINATION.

Employment Contracts

Use employment contract codes to set up the types of contracts the company has entered into with its employees. To open the Employment Contracts window, click SETUP→EMPLOYMENT CONTRACTS.

Qualification

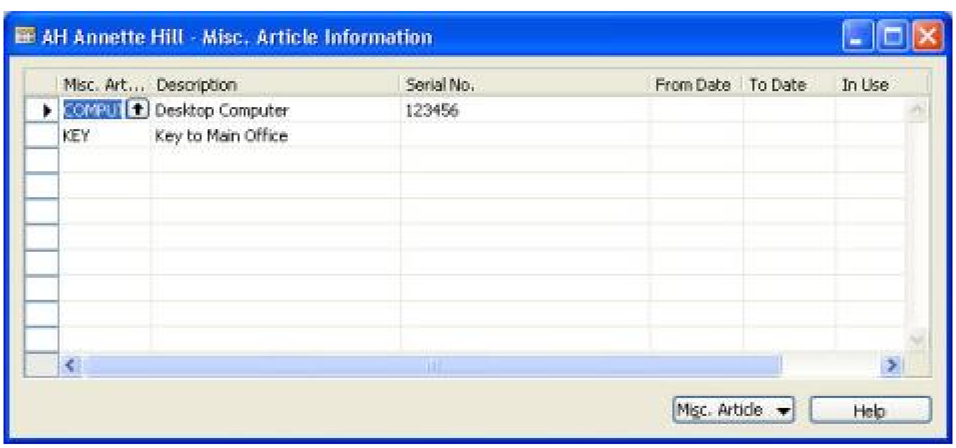
Enter qualification codes to specify various employee qualifications. To open the Employee Qualifications window click SETUP→QUALIFICATIONS.

Relatives

Enter codes for relatives to register the precise relationship of an employee's relatives or close contacts to each employee. To open the Employee Relatives window from the employee card, click EMPLOYEE→RELATIVE.

Miscellaneous Articles

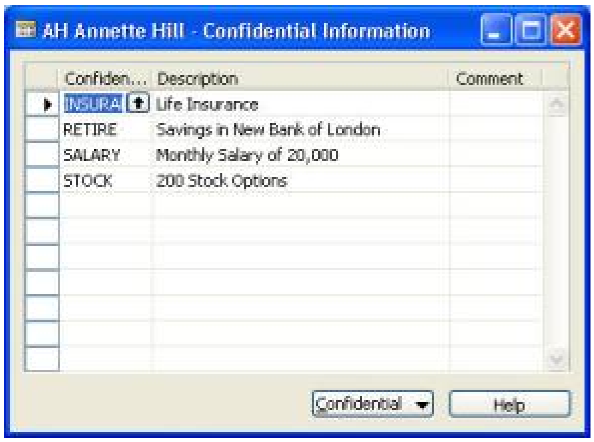
You can set up codes and descriptions for the benefits your employees receive and articles owned by the company that are in the possession of individuals. You do this in the Misc. Article Information window. To open the window from the employee card, click EMPLOYEE→MISC. ARTICLE INFORMATION.



Confidential Information

You use confidential information codes to register confidential aspects of an individual's employment, such as salaries, stock option plans, pensions, and so on. You record confidential information about an employee in the Confidential Information window.

To open the window from the employee card, click EMPLOYEE→CONFIDENTIAL INFORMATION. The Confidential Information window appears:



Business Notification

The Business Notification solution is used to generate and send notifications to inform your vendors or colleagues from other departments about certain events. For example, you may send a notification when you have placed an order and received some of the purchased items, but you are waiting for delivery of the rest of the order. Sending a notification will alert your supplier that some of the goods have not yet been delivered. By enabling this feature in the Notification Setup window, you allow the program to send out six predefined notifications.

Types of Notifications

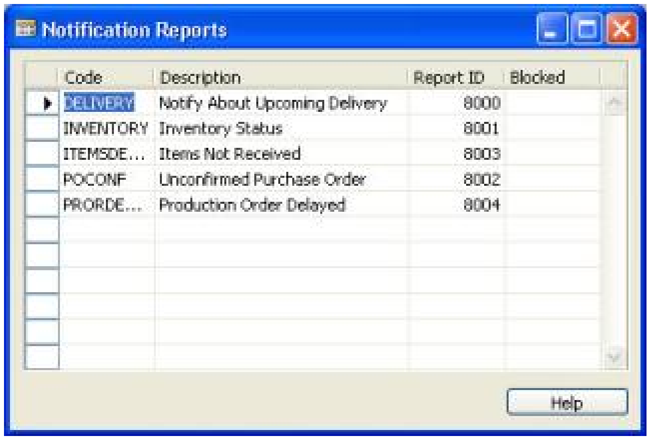
There are two approaches to generating notifications: time-based and field change-based.

The Business Notification solution offers five time-based notifications that alert the recipient about:

- Upcoming deliveries
- Items that were not received after the promised receipt date
- Purchase order confirmations that were not received
- Delayed production orders
- Current inventory status

To see the list of the available time-based notifications, open the Notifications window from the Administration menu, click APPLICATION SETUP→GENERAL→ BUSINESS NOTIFICATION SETUP. The Notification Setup window appears.

Now, click SETUP→NOTIFICATION REPORTS. The Notification Reports window appears:



The sixth, field change-based, notification is used for tracking changes in the Production BOM status. If you have selected the **Send Notifications** check box in the Notification Setup window, this notification is sent every time the status in the corresponding field changes.

Logging Period

You can define how long you want to store sent notification entries. You can specify this period in the Notification Setup window and use it as a default for all time-based notification, or you can assign a logging period to each separate batch.

Batches

Batches are used for managing a specific set of notifications. You can choose to send out up to five predefined time-based notifications for your batch. Field change-based notifications will be sent out automatically.

Sending Notifications

In order to send notification lines, you must first collect them. Among the lines you collect, there may be some notification entries that were sent earlier. Should the lines have been sent earlier, there will be a check mark in the **Sent** field for these lines and the most recent time the notification was sent will be posted in the Notification Lines window.

eCommerce

The eCommerce functionality in Microsoft Navision is divided into two parts: Commerce Portal and Commerce Gateway.

Commerce Portal

Commerce Portal is an e-commerce solution that enables Web-based trading, self-service and other forms of collaboration between a company and all its supply chain partners. Commerce Portal makes it easy for partners – customers, vendors and others – to serve themselves directly from their Web portal – anytime, anywhere. They can maintain and query data and documents across the range of functions found in Microsoft Navision (depending on their particular role and the access rights that have been defined).

With Commerce Portal, you connect your customers and vendors to your business management system by way of the Internet. You respond to your partners' needs with Web access to real-time information and self-service features from within your Microsoft Navision solution. Information is always up-to-date and accurate, and self-service features are relevant to the user's particular business needs.

Commerce Gateway

The Commerce Gateway functionality allows you to set up BizTalk partners from within Microsoft Navision. After this setup has been complete, it is possible to exchange BizTalk documents with your BizTalk partners.

Some of the documents that you can send to your BizTalk partners include:

- Sales Orders
- Sales Invoices
- Sales Credit Memos
- Purchase Orders

In addition to sending the above mentioned documents, it is possible to receive documents as well.

Test Your Knowledge – Other Functional Areas

1. What is the purpose of Contact Management?

2. What is the purpose of Opportunity Management?

3. How many resources may be in a resource group?

4. In Jobs and Resources, what allows you to post job usage of resources; apply entries to Phases, Tasks and Steps; and apply job ledger and item ledger entries?

5. What area of Service Management is used to automate service-oriented tasks?

6. Describe how Service Contract Management can be used.

7. eCommerce is divided into two parts. What are they?

8. In eCommerce, what functionality allows you to set up BizTalk partners from within Microsoft Navision?

9. What is Business Notification used for?

10. There are two approaches to generating Business Notifications. What are they?

11. List the major functional areas found in Human Resources.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.