**Customer Relationship Management in MS Dynamics NAV**

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1. Relationship Customer/Vendor <->Contact Card (Customer- Vendor ->entries such a invoices, payments and so on. Contact->interaction with prospect, clients,… Button Customer->Contact



1. Contact card. To see all contacts and both types of contacts, use F5 !!!



1. Types of the contact (companies and employees)



1. Observe all tabs of the contact card of chosen company as well as employee contact card.



1. By use of shown field with 3 dots open profile and make a modification



1. Start to create interaction by use of wizard.



1. See from contact card by use of Ctrl-F5 created contact entry (interaction entry)



1. Create a new contact card of the type company (manually- F3 and enter data) and from there create customer card by use of template (button Function and create as customer). See the sequence of forms below.









1. Go to the new created customer card and from there back to the contact card.
2. Create one interaction related to contact card in question
3. Create a quote from the contact card from the button Contact->Sales quote
4. Change the quote status to Sales order