Customer Relationship Management in MS Dynamics NAV

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Date	:	28.3.2014

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

C00010 - Customer Card	
General Communication Invoicing Payments Shipping For	reign Trade
No C00010 📖 🥒	Search Name
Name	Balance (LCY) 0,00
Address	Credit Limit (LCY) 0,00
Address 2	Salesperson Code
Post Code/City	Responsibility Center
Country/Region Code	Service Zone Code
Phone No	Blocked
Primary Contact No	Last Date Modified
Contact	
<u></u>	Sales Functions Help

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

	eral Communication	Segment	ation Foreign Trade					
lo.		CT000001	🥒		Search Name	THE CANNO	ON GR	
yp	e	Company			Phone No		l.	50
Com	pany No	CT000001	(†)		Salesperson Code	PS	A state	
Com	pany Name	The Canne	on Group PLC		Salutation Code	COMPANY	•	
lam		The Canno	on Group PLC		Last Date Modified	28.02.07	1	
	ress				Date of Last Interaction .	24.01.08		
		192 Marke	t Square					
١dd	ress 2				Last Date Attempted			
ost	Code/City	B27 4KT	Birmingham	٦	Next To-do Date	22.01.08		
Cou	ntry/Region Code	GB						
(Question		Answer			Ques Li	ast Date	
	- Discount (%) Last Year							
			Low discount usage				31.01.08	1
_	ABC		Low discount usage B					
			В				31.01.08	
	ABC	quency	B > 5 times a year				31.01.08 07.11.13	
	ABC Customer Purchase Fre	quency	B > 5 times a year				31.01.08 07.11.13 31.01.08	
	ABC Customer Purchase Fre Customer Purchase Fre	quency quency ear	B > 5 times a year > 5 times a year				31.01.08 07.11.13 31.01.08 31.01.08	
	ABC Customer Purchase Fre Customer Purchase Fre Turnover (LCY), Last Yo	equency equency ear nt Year	B > 5 times a year > 5 times a year low (below 1,000)				31.01.08 07.11.13 31.01.08 31.01.08 31.01.08	
	ABC Customer Purchase Fre Customer Purchase Fre Turnover (LCY), Last Y Turnover (LCY), Currer	equency equency ear nt Year 'ear	B > 5 times a year > 5 times a year low (below 1,000) High (over 4,000)				31.01.08 07.11.13 31.01.08 31.01.08 31.01.08 31.01.08	
	ABC Customer Purchase Fre Customer Purchase Fre Turnover (LCY), Last Y Turnover (LCY), Currer Discount (%) Current 1	equency equency ear nt Year 'ear	B > 5 times a year > 5 times a year low (below 1,000) High (over 4,000) Medium discount usage				31.01.08 07.11.13 31.01.08 31.01.08 31.01.08 31.01.08 31.01.08	
	ABC Customer Purchase Fre Customer Purchase Fre Turnover (LCY), Last Y Turnover (LCY), Curren Discount (%) Current Y Profit (LCY) Current Ye	equency equency ear nt Year 'ear	B > 5 times a year > 5 times a year low (below 1,000) High (over 4,000) Medium discount usage Top 25 % of Customers				31.01.08 07.11.13 31.01.08 31.01.08 31.01.08 31.01.08 31.01.08 31.01.08	

3. Types of the contact (companies and employees)

	No.	Name	Phone No.	Salespers	Territory	Search N	
Þ	СТ000001	The Cannon Group PLC		PS	FOREIGN	THE CAN	
	CT100140	David Hodgson		PS	MID	DAVID H	
	CT100156	John Emory		PS	MID	JOHN E	
	CT200136	Mindy Martin		PS	FOREIGN	MINDY M	
	CT100210	Stephanie Bourne		PS	MID	STEPHA	
	СТ000138	The Device Shop		PS		THE DEV	
	CT100241	Timeless Reproductions		DC	SCOT	TIMELES	
	CT200130	Alan Steiner		DC	SCOT	ALAN ST	
	CT200035	Carl Langhorn		DC	SCOT	CARL LA	
	CT100213	Patrick M. Cook		DC	SCOT	PATRICK	
	CT000081	Top Bureau		RL	FOREIGN	TOP BUR	
	СТ000102	Topol Slovenija d.o.o.		RL	FOREIGN	TOPOL S	
	CT100234	Bernard Duerr		RL	FOREIGN	BERNAR	
	СТ000108	TON s.r.o.		RL	FOREIGN	TON S.R	

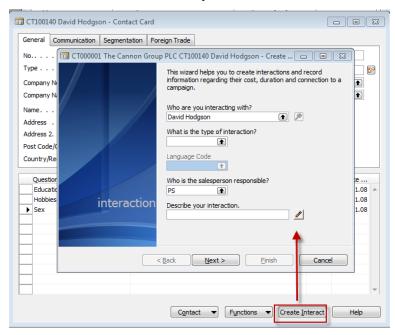
4. Observe all tabs of the contact card of chosen company as well as employee contact card.

101	F100140 David Hodg	son - Conta	ct Card					[6
Ger	neral Communication	Segmenta	tion For	eign Trade						
No.		CT100140		I		Search Name		DAVID H	DDGSON	
Тур	e	Person				Phone No				Ľ
Cor	mpany No	CT000001	٦			Salesperson Code .		PS	۲	
Cor	mpany Name	The Canno	n Group P	LC		Salutation Code		М	۲	
Nar	me	David Hodg	son			Last Date Modified				
Add	dress	192 Market	Square			Date of Last Intera	ction .			
Ado	dress 2					Last Date Attempte	ed			
Pos	t Code/City	B27 4KT	۲	Birmingham	٦	Next To-do Date .		22.01.	08	
Coi	untry/Region Code	GB	۲							
	Question		Answer					Ques	Last Date	
	Question Educational level		Answer Skilled	•				Ques	Last Date 31.01.08	
	Educational level Hobbies	1	Skilled =ootball	·				Ques	31.01.08 31.01.08	3
	Educational level	1	Skilled					Ques	31.01.08	3
	Educational level Hobbies	1	Skilled =ootball					Ques	31.01.08 31.01.08	3
	Educational level Hobbies	1	Skilled =ootball					Ques	31.01.08 31.01.08	3
	Educational level Hobbies	1	Skilled =ootball					Ques	31.01.08 31.01.08	3
	Educational level Hobbies	1	Skilled =ootball					Ques	31.01.08 31.01.08	3
	Educational level Hobbies	1	Skilled =ootball					Ques	31.01.08 31.01.08	3
	Educational level Hobbies	1	Skilled =ootball	Contact		Functions 💌	Create I		31.01.08 31.01.08	3

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

	avid Hodgson	- Contact Card		
General Con	nmunication S	egmentation Foreign Trade		
۱o	ст	100140 📖 🥒	Search Name D	AVID HODGSON
уре	Pe	rson	Phone No	
Company No.	ст	000001	Salesperson Code PS	;
Company Nam	neTh	e Cannon Group PLC	Salutation Code M	۲
lame	Da	vid Hodgson	Last Date Modified	
ddress	19	2 Market Square	Date of Last Interaction .	
ddress 2			Last Date Attempted	
ost Code/Cit	yB2	7 4KT 👔 Birmingham	Next To-do Date	22.01.08
Country/Regio	on Code GB	۲		
Question		Answer	0	ues Last Date
Educationa	al level	Skilled		31.01.08
Hobbies		Football		31.01.08
Hobbies Sex	Стоооо	Male		31.01.08 31.01.08
	Profile Que		T100 D EX	
	Profile Que	Male O1 The Cannon Group PLC C stionnaire C PERSON escription iex	Set	
	Profile Que	Male	Set	
	Profile Que T D Q S A A	Male D1 The Cannon Group PLC C stornaire C [PERSON () escription ex Male Female	Set	
	Profile Que T D Q S ▶ A A Q H	Male D1 The Cannon Group PLC C stornaire C PERSON escription ex Male Female tobbles	Set	
	Profile Que T D Q S ▶ A A Q H A	Male D1 The Cannon Group PLC C stonnaire C PERSON (*) escription esc Male Female tobbles Football	Set	31.01.08
	Profile Que T D Q S A A Q H A A	Male D1 The Cannon Group PLC C stoomaire C [PERSON (*) escription exe Male Fenale tobbies Football Golf	Set	31.01.08
	Profile Que TD QS A A A A A A	Male OI The Cannon Group PLC C stionnaire C PERSON ex Kobal Footbal Golf Golf Tennis	Set	31.01.08
	Profile Que T D Q S ▶ A A A A A A A	Male D1 The Cannon Group PLC C stormaire C [PERSON) escription escription Male Female tobbies Football Golf Tennis Hunting	Set	31.01.08
	Profile Que	Male D1 The Cannon Group PLC C stormaire C PERSON (*) escription exc Male Fenale Tobbies Football Golf Tennis Hunting Other outdoor	Set	31.01.08
	Profile Que	Male D1 The Cannon Group PLC C stornaire C PERSON excription Fex Male Fenale Tobbies Football Golf Tennis Hunting Other outdoor Theater	Set	31.01.08
	Profile Que	Male D1 The Cannon Group PLC C stormaire C PERSON (*) escription exc Male Fenale Tobbies Football Golf Tennis Hunting Other outdoor	Set	31.01.08
	Profile Que	Male D1 The Cannon Group PLC C stornaire C PERSON excription Fex Male Fenale Tobbies Football Golf Tennis Hunting Other outdoor Theater	Set	31.01.08

6. Start to create interaction by use of wizard.

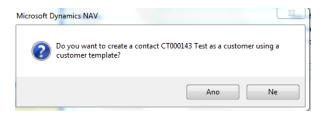


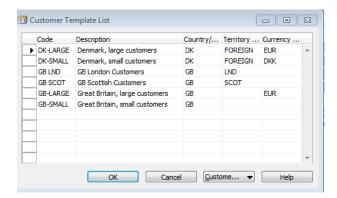
7. See from contact card by use of Ctrl-F5 created contact entry (interaction entry)

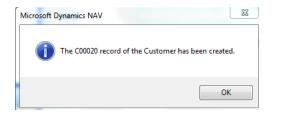
28.02.07 03.01.08		Service Order Create		CT000001	8,00	
03.01.08	S SHIP					
	0_0.11	Order 101001		CT000001	8,00	
04.01.08	S_SHIP	Order 101001		CT000001	8,00	
05.01.08	S_SHIP	Order 101001		CT000001	8,00	
06.01.08	S_INVOICE	Order 101001		CT000001	8,00	
13.01.08	S_C_MEMO	Credit Memo 104001		CT000001	8,00	
16.01.08	S_SHIP	Order 6005		CT000001	8,00	
16.01.08	S_INVOICE	Order 6005		CT000001	8,00	
21.01.08	S_SHIP	Invoice 103001		CT000001	8,00	
21.01.08	S_INVOICE	Invoice 103001		CT000001	8,00	
24.01.08	S_SHIP	Order 101016		CT000001	8,00	
						F.
	06.01.08 13.01.08 16.01.08 16.01.08 21.01.08 21.01.08	06.01.08 S_INVOICE 13.01.08 S_C_MEMO 16.01.08 S_SHIP 16.01.08 S_INVOICE 21.01.08 S_SHIP	06.01.08 S_INVOICE Order 101001 13.01.08 S_C_MEMO Credit Memo 104001 16.01.08 S_SHIP Order 6005 16.01.08 S_INVOICE Order 6005 21.01.08 S_SHIP Invoice 103001 21.01.08 S_INVOICE Invoice 103001 24.01.08 S_SHIP Order 101016	06.01.08 S_INVOICE Order 101001 13.01.08 S_C_MEMO Credit Memo 104001 16.01.08 S_SHIP Order 6005 16.01.08 S_INVOICE Order 6005 21.01.08 S_SHIP Invoice 103001 21.01.08 S_INVOICE Invoice 103001 24.01.08 S_SHIP Order 101016	06.01.08 S_INVOICE Order 101001 CT000001 13.01.08 S_C_MEMO Credit Memo 104001 CT000001 16.01.08 S_SHIP Order 6005 CT000001 16.01.08 S_INVOICE Order 6005 CT000001 21.01.08 S_SHIP Invoice 103001 CT000001 21.01.08 S_INVOICE Invoice 103001 CT000001 24.01.08 S_SHIP Order 101016 CT000001	06.01.08 S_INVOICE Order 101001 CT000001 8,000 13.01.08 S_C_MEMO Credit Memo 104001 CT000001 8,000 16.01.08 S_SHIP Order 6005 CT000001 8,000 16.01.08 S_INVOICE Order 6005 CT000001 8,000 21.01.08 S_SHIP Invoice 103001 CT000001 8,000 21.01.08 S_INVOICE Invoice 103001 CT000001 8,000 24.01.08 S_SHIP Order 101016 CT000001 8,000

8. 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.

) CT000143 Test - Co	ntact Card			
General Communicat	ion Segmentation	Foreign Trade		
No	CT000143	🥒	Search Name	. TEST
Туре	Company		Phone No	🕅
Company No	CT000143	(Salesperson Code	
Company Name	Test		Salutation Code	. COMPANY 🗈
Name	Test		Last Date Modified	. 27.03.14
Address			Date of Last Interaction	ı.
Address 2			Last Date Attempted .	
Post Code/City		Mittersill	Next To-do Date	·
Country/Region Code	•••	٢		
Question	Ansv	ver		Ques Last Date
				· · · · · · · · · · · · · · · · · · ·
-				
_				
		Contact	▼ Functions ▼ Crea	te Interact Help







- 9. Go to the new created customer card and from there back to the contact card.
 10. Create one interaction related to contact card in question
 11. Create a quote from the contact card from the button Contact->Sales quote
 12. Change the quote status to Sales order