

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

C00010 - Customer Card

General Communication Invoicing Payments Shipping Foreign 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

Customer Sales Functions Help

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

CT000001 The Cannon Group PLC - Contact Card

General Communication Segmentation Foreign Trade

No. CT000001 Search Name THE CANNON GR...

Type Company Phone No.

Company No. CT000001 Salesperson Code PS

Company Name The Cannon Group PLC Salutation Code COMPANY

Name The Cannon Group PLC Last Date Modified 28.02.07

Address 192 Market Square Date of Last Interaction 24.01.08

Address 2 Last Date Attempted 24.01.08

Post Code/City B27 4KT Birmingham Next To-do Date 22.01.08

Country/Region Code GB

Question	Answer	Ques...	Last Date ...
Discount (%) Last Year	Low discount usage		31.01.08
ABC	B		07.11.13
Customer Purchase Frequency...	> 5 times a year		31.01.08
Customer Purchase Frequency...	> 5 times a year		31.01.08
Turnover (LCY), Last Year	low (below 1,000)		31.01.08
Turnover (LCY), Current Year	High (over 4,000)		31.01.08
Discount (%) Current Year	Medium discount usage		31.01.08
Profit (LCY) Current Year	Top 25 % of Customers		31.01.08
Company Ownership	Stock Exchange		31.01.08
No. of employees	1..99		31.01.08

Contact Functions Create Interact Help

3. Types of the contact (companies and employees)

Contact List

No.	Name	Phone No.	Salespers...	Territory ...	Search N...
CT000001	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...
CT000138	The Device Shop		PS		THE DEV...
CT100241	Timeless Reproductions		DC	SCOT	TIMEL...
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...
CT000102	Topol Slovenija d.o.o.		RL	FOREIGN	TOPO S...
CT100234	Bernard Duerr		RL	FOREIGN	BERNAR...
CT000108	TON s.r.o.		RL	FOREIGN	TON S.R...

OK Cancel Contact Functions Create Interact Help

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

CT100140 David Hodgson - Contact Card

General Communication Segmentation Foreign Trade

No. CT100140 Search Name DAVID HODGSON

Type Person Phone No.

Company No. CT000001 Salesperson Code PS

Company Name The Cannon Group PLC Salutation Code M

Name David Hodgson Last Date Modified

Address 192 Market Square Date of Last Interaction

Address 2 Last Date Attempted

Post Code/City B27 4KT Birmingham Next To-do Date 22.01.08

Country/Region Code GB

Question	Answer	Ques...	Last Date ...
▶ Educational level	Skilled		31.01.08
Hobbies	Football		31.01.08
Sex	Male		31.01.08

Contact Functions Create Interact Help

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

CT100140 David Hodgson - Contact Card

General Communication Segmentation Foreign Trade

No. CT100140 Search Name DAVID HODGSON

Type Person Phone No.

Company No. CT000001 Salesperson Code PS

Company Name The Cannon Group PLC Salutation Code M

Name David Hodgson Last Date Modified

Address 192 Market Square Date of Last Interaction

Address 2 Last Date Attempted

Post Code/City B27 4KT Birmingham Next To-do Date 22.01.08

Country/Region Code GB

Question	Answer	Ques...	Last Date ...
▶ Educational level	Skilled		31.01.08
Hobbies	Football		31.01.08
▶ Sex	Male		31.01.08

Profile Questionnaire C... PERSON

T... Description Set

Q- Sex

▶ A.. Male ✓

A.. Female

Q- Hobbies

A.. Football ✓

A.. Golf

A.. Tennis

A.. Hunting

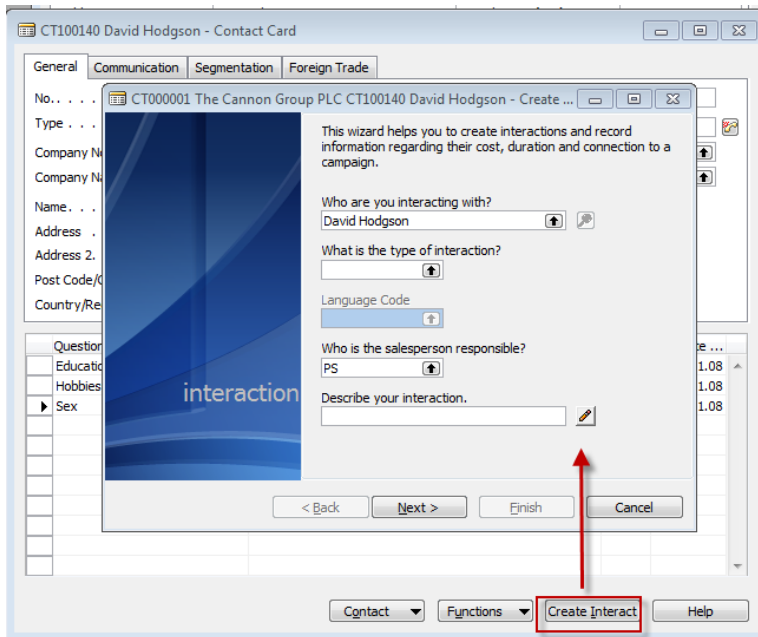
A.. Other outdoor

A.. Theater

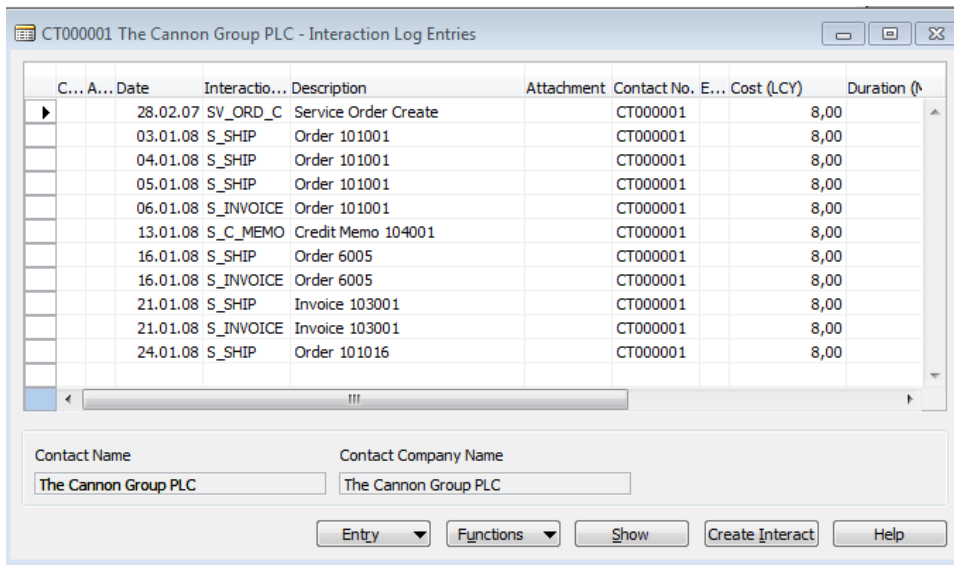
A.. Literature

create Interact Help

6. Start to create interaction by use of wizard.



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



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.

Code	Description	Country/...	Territory ...	Currency ...
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		

At the bottom of the dialog, there are buttons for 'OK', 'Cancel', 'Custome...', and '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