

Introduction to MS Dynamics

NAV XVI. (CRM)

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CRM – Customer Relationship Management

- PROs
 - It enables to keep track of all prospective customer (suspects and prospects)
 - Improve sales and marketing service
 - Company can promote the work it has done for its customers in order to approach prospects
- CONs
 - CRM software may not integrate well with other email and accounting systems
 - Another disadvantage to a newly implemented CRM software is the learning curve.

CRM – Customer Relationship Management

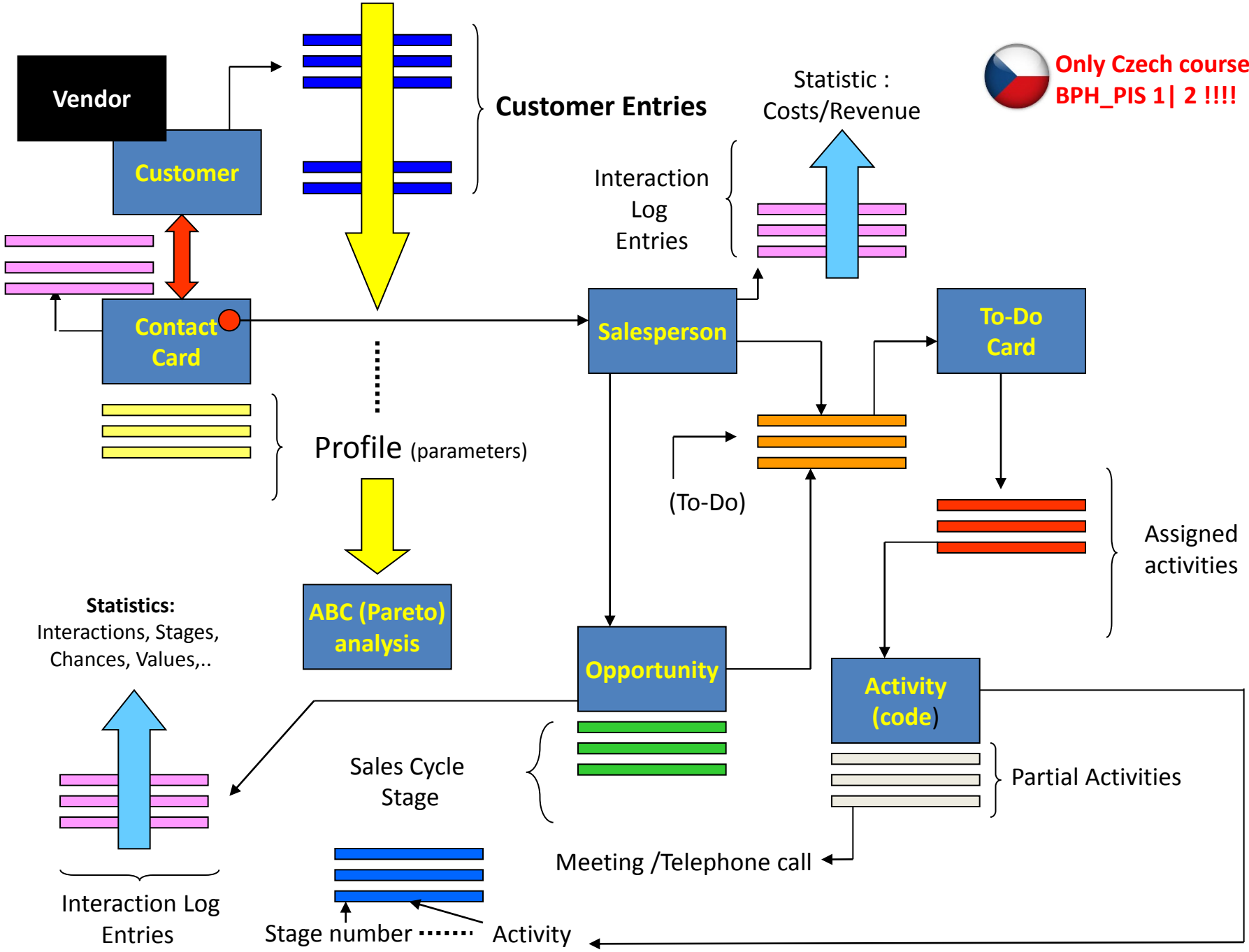
- Relationship management is a customer-oriented feature with service response based on customer input, one-to-one solutions to customers' requirements, direct online communications with customer and customer service centers that help customers solve their issues.
- Sales force automation
 - Sales promotion analysis
 - Advertising
 - Personal selling
 - Direct marketing
 - Public relations
 - automate tracking of a client's account history
 - Use of technology (ERP)
- Opportunity Management

Market leaders


Vendor	2013 Revenue	2013 Share (%)	2012 Revenue	2012 Share (%)
Salesforce.com CRM	3,292	16.1	2,525.6	14.0
SAP AG	2,622	12.8	2,327.1	12.9
Oracle	2,097	10.2	2,015.2	11.1
Microsoft Dynamics CRM	1,392	6.8	1,135.3	6.3
Others	11,076	54.1	10,086.8	55.7
Total	20,476	100	18,090	100

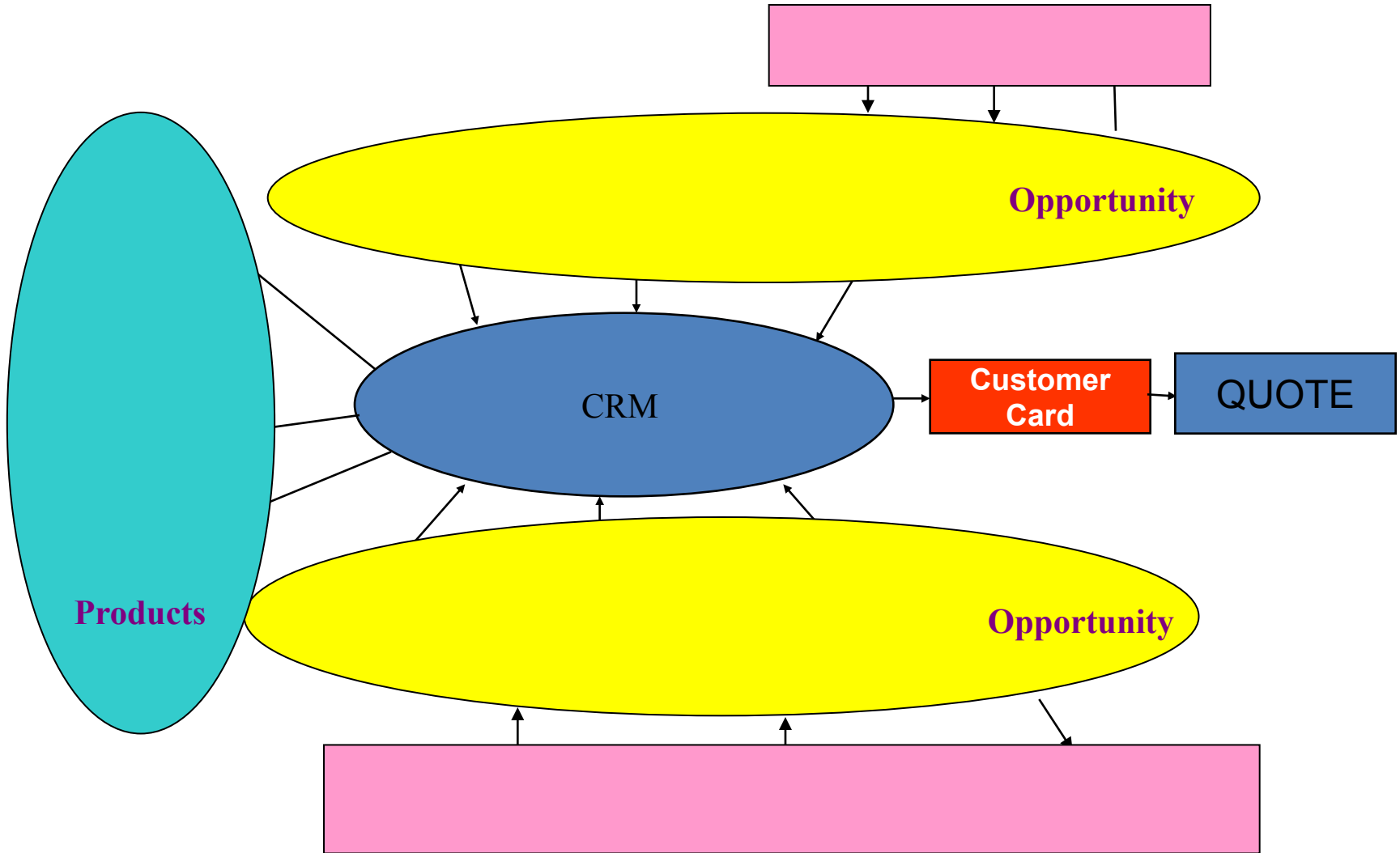
figures in millions of US dollars

Resource: [^ "Gartner Says Worldwide Customer Relationship Management Market Grew 23 Percent in 2007" \(Press release\). Gartner, Inc. 12 September 2008. Retrieved 2008-08-15.](#)



ERP-CRM

 Only Czech course
BPH_PIS1 | 2 !!!!



Contact cards

- Contact card- company
- Contact card- person
- Contact Character– profiles, technologies,..
- Interactions
- Business Opportunities (estimated close date and value, probability,..)
- Sales Cycles
- Customer Card creation from Contact card
- Quotes

Karta kontaktu- společnost (hlavička karty) I

Správce vztahů

- Kontakty** →
- Prodejci
- Těmly**
- Kampaně
- Segmenty
- Příležitosti
- Úkoly
- Sestavy

Obecné	Spojení	Segmentace	Ekonomika	Zahr.obchod	Commerce Portal	Tech.profil	Pipeline	Rizika
Číslo	9631							
Typ								
Číslo společnosti	9631							
Název společnosti	DRIPOL, s.r.o.							
Název	DRIPOL, s.r.o.							
Název 2								
Adresa	Kulinářská 1							
PSC/město	602 00	Brno						
Kód země	CZ							
Vyhledávací název	DRIPOL, S.R.O.							
Primární kontakt	<input type="checkbox"/>							
Komunikační styl	Neznámý							
Kód prodejce	JSK							
Decision Maker	<input type="checkbox"/>							
Funkce								
Typ nakupujícího	Neznámý							
Pro nás								
Změněno dne	21.09.06							
Kód typu								
Kód původu kontaktu	ALBERTINA							
Fáze obch.příležitosti	PROSPECT							

Kontakty typu
osoba



Contact Card

Sales & Marketing

- [-] Sales
- [-] Order Processing
- [-] Marketing
 - Contacts** →
 - Contact Search
 - Campaigns
 - Segments
 - Logged Segments
 - To-dos
- [-] Reports
- [-] Periodic Activities
- [-] Setup
- [-] Inventory & Pricing
- [-] Analysis & Reporting
- [-] History
- [-] Setup

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 11.12.10

Address 192 Market Square Date of Last Interaction 26.01.12

Address 2. Last Date Attempted 26.01.12

Post Code/City B27 4KT Birmingham Next To-do Date 24.01.12

Country/Region Code GB

Question	Answer	Ques...	Last Date ...
Discount (%) Last Year	Low discount usage		31.01.12
Customer Purchase Frequency...	> 5 times a year		31.01.12
Customer Purchase Frequency...	> 5 times a year		31.01.12
Turnover (LCY), Last Year	low (below 1,000)		31.01.12
Turnover (LCY), Current Year	High (over 4,000)		31.01.12
Discount (%) Current Year	Medium discount usage		31.01.12
Profit (LCY) Current Year	Top 25 % of Customers		31.01.12
Company Ownership	Stock Exchange		31.01.12
▶ No. of employees	1..99		31.01.12

Contact Card- Person

CT100216 Bonnie Kearney - Contact Card

General | Communication | Segmentation | Foreign Trade

No. CT100216 Search Name BONNIE KEARNEY

Type Person Phone No.

Company No. CT100245 Salesperson Code DC

Company Name TenTails Direct Ltd Salutation Code F

Name Bonnie Kearney Last Date Modified 20.10.14

Address Tower Road Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City TA3 4FD Newquay Next To-do Date

Country/Region Code GB

Question	Answer	Ques...	Last Date ...
Personality	Extrovert		20.10.14
Educational level	Skilled		31.01.12
Marital Status	Married		31.01.12
Hobbies	Hunting		20.10.14
Hobbies	Golf		31.01.12
Hobbies	Football		31.01.12
▶ Sex	Female		31.01.12

Contact Functions Create Interact Help

Contact Card- Company-person new

CT000144 Fast software company - Contact Card

General Communication Segmentation Foreign Trade

No. CT000144 Search Name FAST SOFTWARE...

Type Company Phone No.

Company No. CT000144 Salesperson Code JR

Company Name Fast software company Salutation Code COMPANY

Name. Fast software company Last Date Modified 20.10.14

Address Steven Jibs Avenue 1 Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City ZA-8000 Cape Town Next To-do Date

Country/Region Code ZA

Question	Answer	Ques...	Last Date ...
Additional Business Relations	Partner		20.10.14
Company Ownership	Stock Exchange		20.10.14
▶ No. of employees	1..99		20.10.14

Contact Functions Create Interact Help

CT000145 Garry Hilton - Contact Card

General Communication Segmentation Foreign Trade

No. CT000145 Search Name GARRY HILTON

Type Person Phone No.

Company No. CT000144 Salesperson Code JR

Company Name Fast software company Salutation Code UNISEX

Name. Garry Hilton Last Date Modified 20.10.14

Address Steven Jibs Avenue 1 Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City ZA-8000 Cape Town Next To-do Date

Country/Region Code ZA

Question	Answer	Ques...	Last Date ...
▶ Personality	Analytical		20.10.14
Educational level	Master/ Ph.d		20.10.14
Marital Status	Married		20.10.14
Hobbies	Golf		20.10.14
Hobbies	Football		20.10.14
Sex	Male		20.10.14

Contact Functions Create Interact Help

New interaction

CT000145 Garry Hilton - Contact Card

General Communication Segmentation Foreign Trade

No. CT000145 Search Name GARRY HILTON
Type Person Phone No.
Company No. CT000144 Salesperson Code JR
Company Name Fast software company Salutation Code UNISEX
Name Garry Hilton Last Date Modified 20.10.14
Address Steven Jibs Avenue 1 Date of Last Interaction
Address 2 Last Date Attempted
Post Code/City ZA-8000 Cape Town Next To-do Date
Country/Region Code ZA

Question	Answer	Ques...	Last Date ...
Personality	Analytical		20.10.14
Educational level	Master/Ph.d		20.10.14
Marital Status	Married		20.10.14
Hobbies	Golf		20.10.14
Hobbies	Football		20.10.14
Sex	Male		20.10.14

Contact Functions **Create Interact** Help



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

This wizard helps you to create interactions and record information regarding their cost, duration and connection to a campaign.

Who are you interacting with?
Garry Hilton

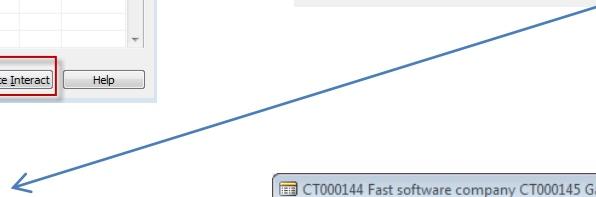
What is the type of interaction?
MEETINV

Language Code

Who is the salesperson responsible?
JR

Describe your interaction.
Quotation during meetin

< Back **Next >** Finish Cancel



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

The following fields are optional. If you want to log your interaction now, click Finish.

Correspondence Type

When did the interaction take place?
09.09.12 11:00:00

What is the direction of the information flow?
Outbound

Initiated By
Us

Enter the evaluation of the interaction here:
Very Positive

The interaction attempt was successful.

< Back **Next >** Finish Cancel



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

The following fields are optional. If you want to log your interaction now, click Finish.

What is the cost of the interaction (LCY)?
1 000,00

How long did the interaction last (Min.)?
360

< Back **Next >** Finish Cancel

New interaction

CT000144 Fast software company CT000145 Garry Hilton - Interaction Log Entries *Interaction entry*

C... A...	Date	Interactio...	Description	Attachment	Contact No. E...	Cost (LCY)	Duration (Min.)	Salespers...	Campa
	09.09.12	MEETINV	Quotation during meetein		CT000145 V..	1 000,00	360	JR	



Create new opportunity

Address Steven Jibs Avenue 1 Date of Las
Address 2. Last Date A
Post Code/City ZA-8000 Cape Town Next To-do
Country/Region Code ZA

Question	Answer
▶ Additional Business Relations	Partner
Company Ownership	Stock Exchange
No. of employees	1..99

- Remaining groups
- Profiles
- Statistics F9
- Picture
- Comments
- Alternative Address ▶
- Interaction Log Entries Ctrl+F5
- Postponed Interactions
- To-dos
- Opportunities ▶**
- Segments
- Sales Quotes
- Customer/Vendor/Bank Acc.
- Online Map

Contact Functions Create Interact Help

New opportunity

CT000144 Fast software company - Create Opportunity

This wizard helps you to create opportunities.

Describe the opportunity.
Selling MS Dynamics NAV

What is the date of the opportunity?
09.09.12

What is the priority of the opportunity?
Normal

< Back Next > Finish Cancel



CT000144 Fast software company - Create Opportunity

You must now record the Contact, Salesperson and Sales Cycle of this Opportunity.

Which contact is involved?
Fast software company

Which salesperson is involved with this opportunity?
JR

What is the sales cycle code?
EX-LARGE

Sales Cycles

Code	Description	Probability Calcula... 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

Contact Name

OK Cancel Sales Cycle Help

New opportunity

CT000144 Fast software company - Create Opportunity

You can now specify the estimated values regarding the opportunity if you activate the first sales cycle stage.

Activate the First Stage.

What is the estimated sales value (LCY)?
1 000 000,00

What are the chances of success (%)?
20

What is the estimated closing date?
12.12.12

opportunity

< Back Next > Finish Cancel

New opportunity

The screenshot displays the 'OP000001 Selling MS Dynamics NAV - Opportunity Card' window. The 'General' tab is active, showing fields for No., Description, Contact No., Contact Name, Contact Company Name, Salesperson Code, Sales Document Type, Sales Document No., Campaign No., Priority, Sales Cycle Code, Status, Closed, Creation Date, and Date Closed. Below these fields is a table with columns: Active, Action Taken, Sales Cycle Stage, Date of Change, Estimated Close Date, Estimated Value (LCY), Calcd. Current Value (LCY), Completed %, Chances of Success %, and Probability %.

Active	Action Taken	Sales Cycle Stage	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
▶	✓	1	09.09.12	12.12.12	1 000 000,00	4 000,00	2	20	0

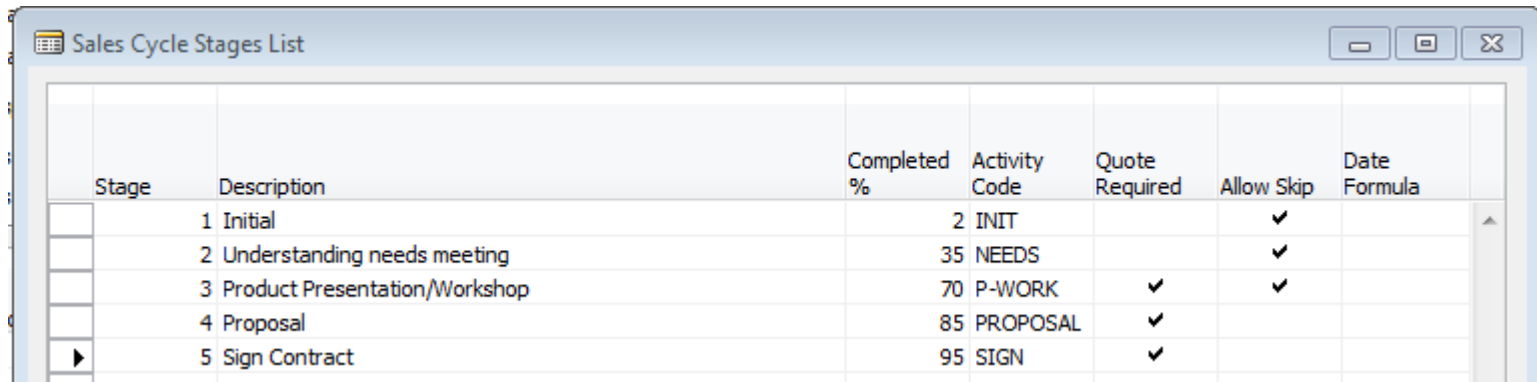
A red box highlights the 'Sales Cycle Stage' cell containing '1'. A red arrow points from this cell to a 'Sales Cycle Stages List' dialog box. The dialog box shows a list of stages:

Stage	Description	Complete...	Activity C...	Quote Re...	Allow Skip	Date For...	C...
▶	1 Initial		2 INIT		✓		
	2 Understanding needs meeting		35 NEEDS		✓		
	3 Product Presentation/Workshop		70 P-WORK	✓	✓		
	4 Proposal		85 PROPOSAL	✓			
	5 Sign Contract		95 SIGN	✓			

At the bottom of the dialog box are buttons for 'OK', 'Cancel', 'Sales Cy...', and 'Help'. The main window also has buttons for 'Opportunity', 'Functions', 'Create Oppo...', and 'Help'.

From here you can create various To-Dos and and change Sales Cycle stages

Sales Cycle Stages



Stage	Description	Completed %	Activity Code	Quote Required	Allow Skip	Date Formula
	1 Initial		2 INIT		✓	
	2 Understanding needs meeting		35 NEEDS		✓	
	3 Product Presentation/Workshop		70 P-WORK	✓	✓	
	4 Proposal		85 PROPOSAL	✓		
▶	5 Sign Contract		95 SIGN	✓		

Contact card->To-Dos->Activities



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CT000144 Fast software company - Contact Card

General Communication Segmentation Foreign Trade

No. CT000144 Search Name FAST SOFTWARE...

Type Company Phone No.

Company No. CT000144 Salesperson Code JR

Company Name Fast software company Salutation Code COMPANY

Name Fast software company Last Date Modified 20.10.14

Address Steven Jibs Avenue 1 Date of Last Interaction 09.09.12

Address 2. Last Date Attempted 09.09.12

Post Code/City ZA-8000 Cape Town Next To-do Date 09.09.12

Country/Region Code ZA

Question	Answer
Additional Business Relations	Partner
Pareto	C
Company Ownership	Stock Exchange
No. of employees	1..99

Contact Functions Create Interact Help

To-Dos



CT000144 Fast software company - To-do List

Closed	Starting Date	Type	Description	Priority	Status	Organizer To-do No.	Date Closed	Canceled	Comment	Contact No.	Salesperson Code
	09.09.12		Verify quality of opportunity	High	Not Started	TD000051				CT000144	JR
	16.09.12		Identify key persons	Normal	Not Started	TD000053				CT000144	JR

Contact Name: Fast software company Contact Company Name: Fast software company

Assign activities

To-do Functions Create To-do Help

Contact card->To-Dos->Activities



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CT000144 Fast software company - Assign Activity

This wizard helps you to assign activities. The Meeting Organizer field should be filled in if this activity is assigned to a team and contains a To-do of type Meeting.

What is the activity code?
P-PRES

What is the activity start date?
21.10.14

Which contact is involved in this activity?
Fast software company

Who is the salesperson responsible?

Which team is involved in this activity?
SALE

Who is the meeting organizer?

< Back Next > Finish Cancel

Activity List

Code	Description
C-PRES	Company Presentation to-dos
INIT	Initial to-dos
NEEDS	Understanding needs to-dos
PROPOSAL	Proposal to-dos
P-PRES	Product Presentation
P-WORK	Presentation/Workshop
QUAL	Qualification to-dos
SIGN	Sign Contract to-dos
WORKS...	Workshop to-dos

OK Cancel Activity Help

CT000144 Fast software company - Assign Activity

This wizard helps you to assign activities. The Meeting Organizer field should be filled in if this activity is assigned to a team and contains a To-do of type Meeting.

What is the activity code?
P-PRES

What is the activity start date?
21.10.14

Which contact is involved in this activity?
Fast software company

Who is the salesperson responsible?

Which team is involved in this activity?
SALE

Who is the meeting organizer?

< Back Next > Finish Cancel

P-PRES Product Presentation - Activity

Code P-PRES
Description Product Presentation

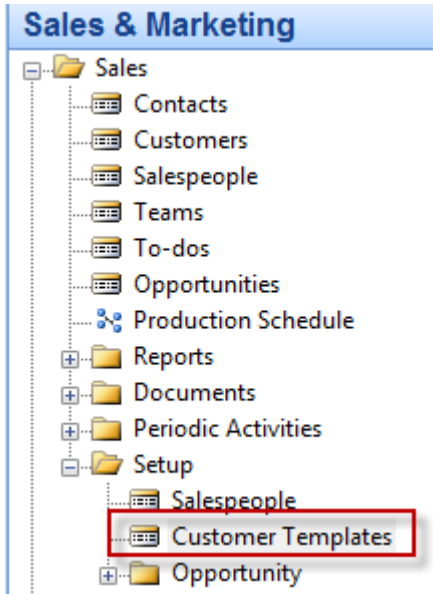
Type	Description	Priority	Date Formula
Phone Call	Make appointment for product pres...	Normal	
	Confirm product presentation in wri...	High	+2D
	Book necessary equipment	Normal	+2D



How to create a new customer from contact card



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ZAR LARGE - Customer Template Card

General

Code	ZAR LARGE	Gen. Bus. Posting Group .	NATIONAL
Description	Large SA company	VAT Bus. Posting Group .	NATIONAL
Country/Region Code . .	ZA	Customer Posting Group .	DOMESTIC
Territory Code	CAPE	Customer Price Group . .	TOP1
Currency Code	ZAR	Customer Disc. Group . .	LARGE ACC
		Allow Line Disc.	<input checked="" type="checkbox"/>
		Invoice Disc. Code . . .	ZAR LARGE
		Payment Terms Code . . .	14 DAYS
		Payment Method Code . .	BANK
		Shipment Method Code .	DELIVERY

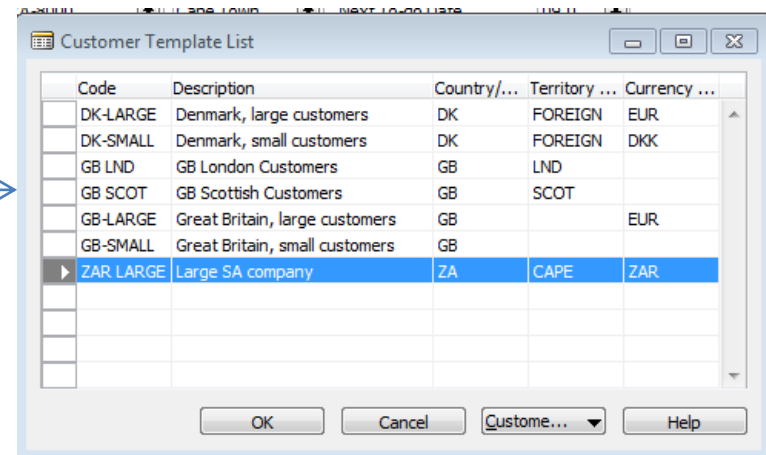
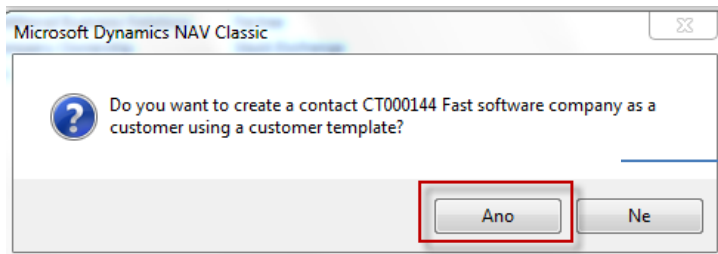
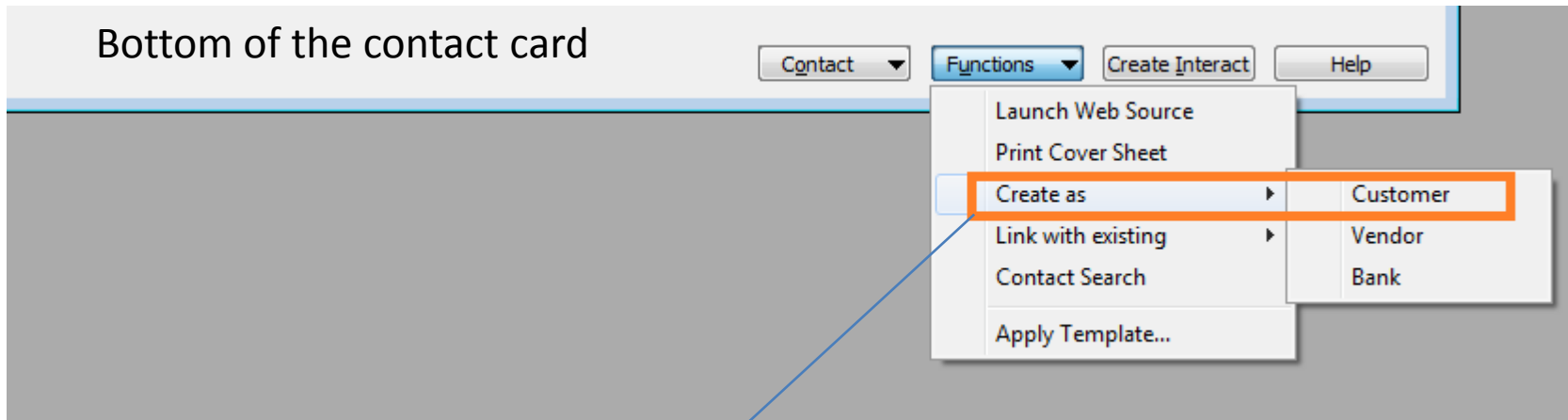
Enter data either by writing
or by use Look-up (F6)

Custom... Sales Help

How to create a new customer from contact card



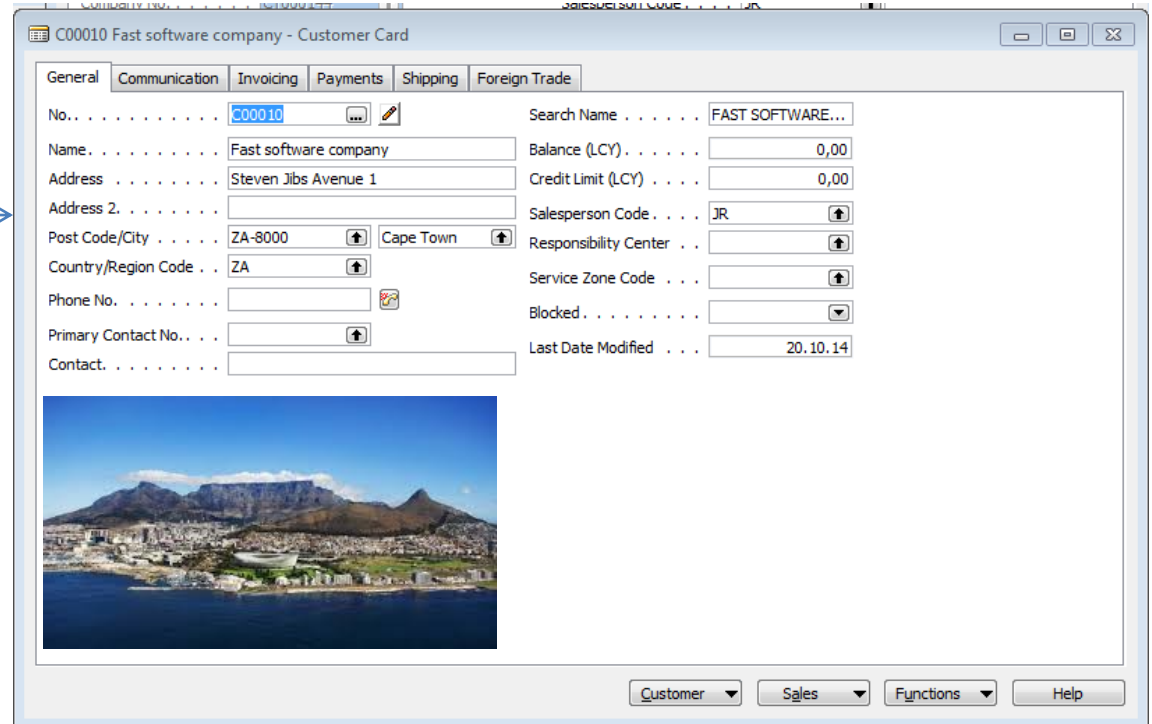
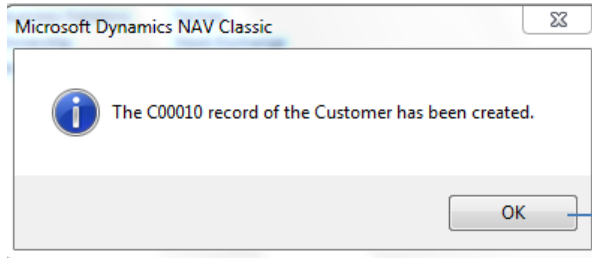
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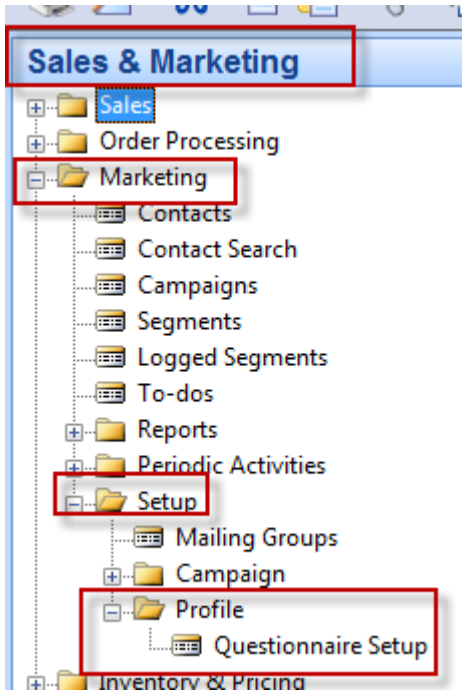
How to create a new customer from contact card



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Personal profile creation



The 'Profile Questionnaire Setup' dialog box is shown. It features a dropdown menu for 'Profile Questionnaire C...' with 'COM...' selected. Below this is a table of questionnaire items:

T...	Description	Multiple A...	Priority	Auto Con...	From Value	To Value	No. of Co...
Q.. No. of employees							
A..	1..99		Normal				39
A..	100..499		Normal				57
A..	500..999		Normal				15
A..	1000+		Normal				7
Q.. Company Ownership							
A..	Stock Exchange		Normal				71
A..	Family		Normal				28
A..	Foundation		Normal				18
A..	Government		Normal				1
A..	Institution		Normal				2

Below the table are buttons for 'Line', 'Functions', and 'Help'. At the bottom of the dialog are 'OK', 'Cancel', 'Edit Questio...', and 'Help' buttons.

The 'Profile Questionnaires' list below shows the following items:

Code	Description	Priority	Contact Type	Business ...
COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADQ	Lead Qualification	Normal	Companies	PROS
PERSON	General personal information	Normal	People	
PORTF	Customer Portfolio Management	Normal	Companies	CUST
POTENTIAL	Customer Sales Potential	Normal	Companies	CUST
SATISF	Customer Satisfaction Index	Normal	Companies	CUST

A red arrow points from the 'PERSON' entry in the list to the 'COM...' dropdown in the setup dialog.

In the bottom right corner, there is a small logo featuring a yellow smiley face with question marks and the text 'Who Am I?'.

Personal profile creation

Profile Questionnaire Setup

Profile Questionnaire C... PERSON

T...	Description	Multiple A...	Priority	Auto Con...	From Value	To Value	No. of Co...
▶ Q..	Sex						
A..	Male		Low				152
A..	Female		Low				96
▶ Q..	Hobbies	✓					
A..	Football		Low				51
A..	Golf		Low				87
A..	Tennis		Low				81
A..	Hunting		Low				67
A..	Other outdoor		Low				67
A..	Theater		Low				48
A..	Literature		Low				29
A..	Design		Low				32
▶ Q..	Marital Status	✓					
A..	Married		Low				116
A..	Children		Low				102
▶ Q..	Educational level						
A..	Master/ Ph.d		Normal				10
A..	Bachelor		Normal				58
A..	Skilled		Normal				123
▶ Q..	Personality	✓					
A..	Extrovert		Normal				74
A..	Analytical		Normal				41

Line Functions Help

Profile Contacts

Contact No.	Contact Company Name	Contact Name
▶ CT000145	Fast software company	Garry Hilton
CT100125	Cane Showroom	Andrew Lan
CT100131	Rent a Truck	Kevin F. Browne
CT100132	Spotsmeyer's Furnishings	Andrew Cencini
CT100135	Viksjo Snickerifabrik AB	Andreas Berglund
CT100141	Boybridge Tool Mart	John Tippett

Add a new question

▶ Ques...	Drinks	✓	
Answer	Whisky		Normal
Answer	Wine		Normal
Answer	Beer		Normal
Answer	Water		Normal
Answer	Coca-Cola		Normal

Personal profile creation

The screenshot shows a CRM interface for a contact card. The main window is titled "CT100197 Amy E. Alberts - Contact Card". It has tabs for "General", "Communication", "Segmentation", and "Foreign Trade". The "General" tab is active, showing fields for No., Type, Company No., Company Name, Name, Address, Post Code/City, and Country/Region Code. To the right, there are fields for Search Name, Phone No., Salesperson Code, Salutation Code, Last Date Modified, Date of Last Interaction, Last Date Attempted, and Next To-do Date.

Below the form is a table with columns "Question" and "Answer":

Question	Answer
Educational level	Skilled
Hobbies	Literature
Sex	Female

An overlay dialog box titled "CT100017 Furnitures At Work CT100197 Amy ..." is open. It shows a "Profile Questionnaire C..." for "PERSON". The dialog contains a table with columns "T... Description" and "Set":

T... Description	Set
A.. Bachelor	
A.. Skilled	✓
Q.. Personality	
A.. Extrovert	
A.. Analytical	
Q.. Drinks	
A.. Whisky	✓
A.. Wine	✓
A.. Beer	✓
A.. Water	✓

Red boxes highlight the ellipsis icon in the top right of the dialog and the "Set" column checkboxes. A red arrow points from the ellipsis icon to the "Set" column of the "Skilled" row.

Personal profile creation

CT100197 Amy E. Alberts - Contact Card

General Communication Segmentation Foreign Trade

No. CT100197 Search Name AMY E. ALBERTS

Type Person Phone No.

Company No. CT100017 Salesperson Code AH

Company Name Furnitures At Work Salutation Code F

Name. Amy E. Alberts Last Date Modified

Address 854 Theater Road Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City WD1 6YG Watford Next To-do Date

Country/Region Code GB

Question	Answer
Drinks	Water
Drinks	Beer
Drinks	Wine
Drinks	Whisky
Educational level	Skilled
Hobbies	Literature
Sex	Female

Pareto analysis based on company profile



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Profile Questionnaires

Code	Description	Priority	Contact Type	Business ...
COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADO	Lead Qualification	Normal	Companies	PROS
PARETO	Pareto analysis	Normal	Companies	CUST
PERSON	General personal information	Normal	People	

Add new line

Profile Questionnaire Setup

Profile Questionnaire C... PARETO

Type	Description	Multiple A...	Priority	Auto Con...	From Value	To Value	No. of Co.
Ques...	Pareto						

Line Functions Help

Question Details Shift+F5

Answer Where-Used

Add Question details

Pareto - Profile Question Details

General Classification

Description Pareto

Multiple Answers

Pareto - Profile Question Details

General Classification

Auto Contact Classific...

Customer Class. Field . Sales (LCY)

Vendor Class. Field .

Contact Class. Field . Answer Points

Min. % Questions ...

Starting Date Formula . -5Y

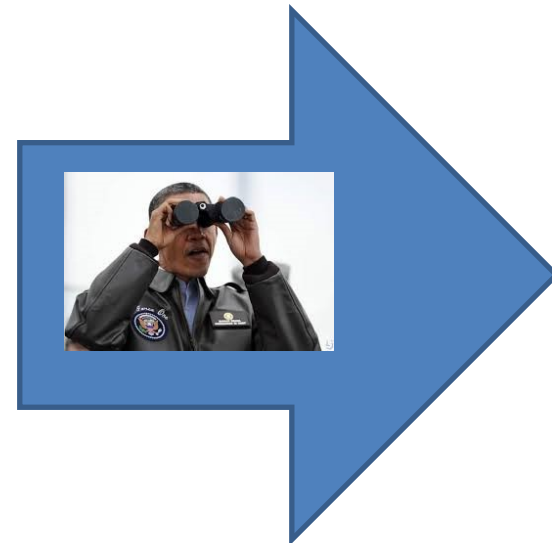
Ending Date Formula . CM

Classification Method . Defined Value

Sorting Method .

No. of Decimals 0

Help



Pareto analysis based on company profile



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Profile Questionnaire Setup

Profile Questionnaire C... PARETO

Type	Description	Multiple Answers	Priority	Auto Contact ...	From Value	To Value	No. of Contacts
Ques...	Pareto	✓		✓			
Answer	A		Normal		10 001	4 000 000	3
Answer	B		Normal		5 001	10 000	1
Answer	C		Normal			5 000	65

Line Functions Help

CT000002 Selangorian Ltd. - Contact Card

General Communication Segmentation Foreign Trade

Company No. CT000002

Company Name Selangorian Ltd.

Address 153 Thomas Drive

Country/Region Code GB

Question	Answer
Discount (%) Current Year	Low discount usage
Discount (%) Last Year	Low discount usage
Pareto	B
Customer Purchase Frequency...	3-5 times a year

- Create Rating
- Update Classification**
- Move Up
- Move Down
- Print
- Test Report

End of the section XVI.

