

Simple scenario of the eighth ERP Microsoft Dynamics NAV session VIII.

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Date	:	31.3.2017
Reason	:	Customer Relationship (CRM) basic function in ERP systems
For	:	MPH_AOMA students
Used database	:	MS Dynamics NAV 2009 W1 (British database)
Used keys	:	F5, F3, F6 (look-up) and Ctrl-F5 (from card to entries) and Shift-F5 in order to go to chosen card. F7 - filter on one field. F9 -Statistics
Used abbreviations	:	Q=question, G/L=General Ledger, Simple Scenario = SS, PWP=Power-Point, SO=Sales Order, TO=Transfer Order, PO=Purchase Order , MC=Mouse cursor , ENTER →key enter
Related documents	:	Scenarios I-VII
Intention	:	Training and hands on

1. Menu-> Sales & Marketing ->Marketing->Contacts. What can you see ? We do have two types of Contact card (Company, Person)
2. Reasons of having Contact card : contact card could be simple prospective buyer, interested party,.. and so on. Briefly meanwhile the one who did not signed a contract (deal) or did not ordered goods or services or both.
3. **F5**- list of all contacts. Explain why some of them are typed in **bold** whilst the other are not!
4. See the lines (question-answers). This is simple attributes of contact.
5. See differences in contact lines related to companies and to persons.
6. **F5**-> list of all contacts. Go to the one related to person. **Shift-F5** to Contact card. Put your cursor to answer in contact line field for person. You will see small icon with 3 dots on the right side of the field. This is symbol for so called drill down function. When you click on it you see predefined questioner. Make your choice (e.g. change marital status) and **ENTER –ESC**. You see immediately modified line in question.
7. Some of the Contact card are not connected to Customer card some of them already is. Teacher will explain this more in detail.
8. Go to button **Contact**->Customer/Vendor/Bank choice and make **ENTER** .You will go from Contact card to customer card. From there you can go back by use of ESC or button **Customer**-> Contact choice.
9. See other tabs on contact card. Contact information, segmentation and Foreign trade.
10. Teacher will explain what it is interaction and relate interaction entries (planning meeting, telephone calls, direct e-mail action, invitation to seminars and so on).
11. Go to button **Create Interaction** and follow instruction given by wizard. Type of interaction: meeting, describe your interaction : meeting invitation, **NEXT**, cost of interaction : 10, how log :40 and **FINISH**

12. From to contact card make **Ctrl-F5** ->see interaction entries. The last one is yours.

CT000001 The Cannon Group PLC - Interaction Log Entries								
	A...	Interaction						
C... F...	Date	Code	Description	Attachment	Contact No.	Eva...	Cost (LCY)	Duration (Min.)
▶	20.09.15	MEETINV	meeting invitation		CT000001		10,00	40

13. From contact card **CT000001** use button **Contact** and make Opportunity choice. The list of opportunities I open. Make a choice of fist one and **Shift-F5** to go to card.
14. Teacher will explain the structure of header and opportunity lines. Cycle stages, Estimated value of deal on which salesperson is working, estimated close date, probability of the closing and so on.
15. From Opportunity card go to statistics (**F9**) and then go back by **ESC**.
16. Go back from Opportunity card by **ESC** to Contact card and see Statistics (**F9**).
17. Go to button **Contact** and Sales Quotes choice!
18. New document is open. Make Enter to create new unique document number
19. Immediately the header is automatically fulfilled by data from Customer card relate to Contact card from where we created Quote
20. Enter data (base on your knowledge from previous scenarios especially related to Purchase and Sales orders)

Type	No.	Description	Location ...	Quantity	Unit of M...	Unit Price...	Line #
▶ Item	1972-S	MUNICH Swivel Chair, yellow	BLUE	1	PCS	123,30	▲

21. Button **Make Order** ->Do you want to convert quote to order->**Yes**
22. If you create a new quote (use similar data) and **do not** push button **Make Order**
23. Go to Contact card and from there to Customer card and button Customer->Sales History->Used as Sell-to customer, where you can see created quotes and orders. For instance go to Quotes, and click on button Show.