

# Introduction to MS Dynamics

NAV XVI. (CRM for MPH\_AOMA)

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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

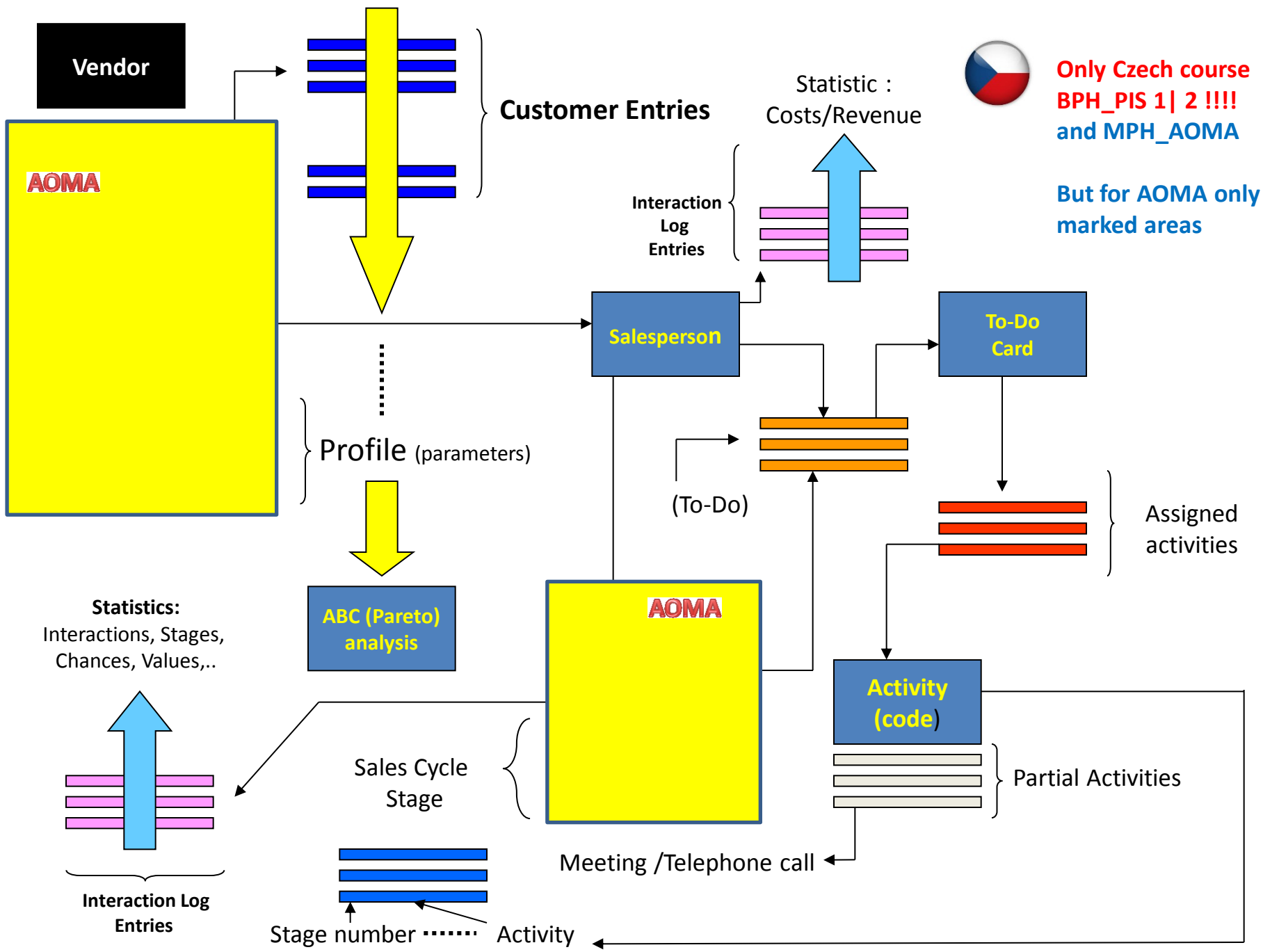
- Relationship management is a customer-oriented feature with service response based on customer input, one-to-one solutions to customers' requirements, direct online communications with customer and customer service centers that help customers solve their issues.
- Sales force automation
  - Sales promotion 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
<b>Total</b>	<b>20,476</b>	<b>100</b>	<b>18,090</b>	<b>100</b>

*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.](#)



Only Czech course  
 BPH\_PIS 1| 2 !!!!  
 and MPH\_AOMA

But for AOMA only  
 marked areas

**AOMA**

**Salesperson**

**To-Do Card**

**Profile (parameters)**

**ABC (Pareto) analysis**

**AOMA**

**Activity (code)**

**Partial Activities**

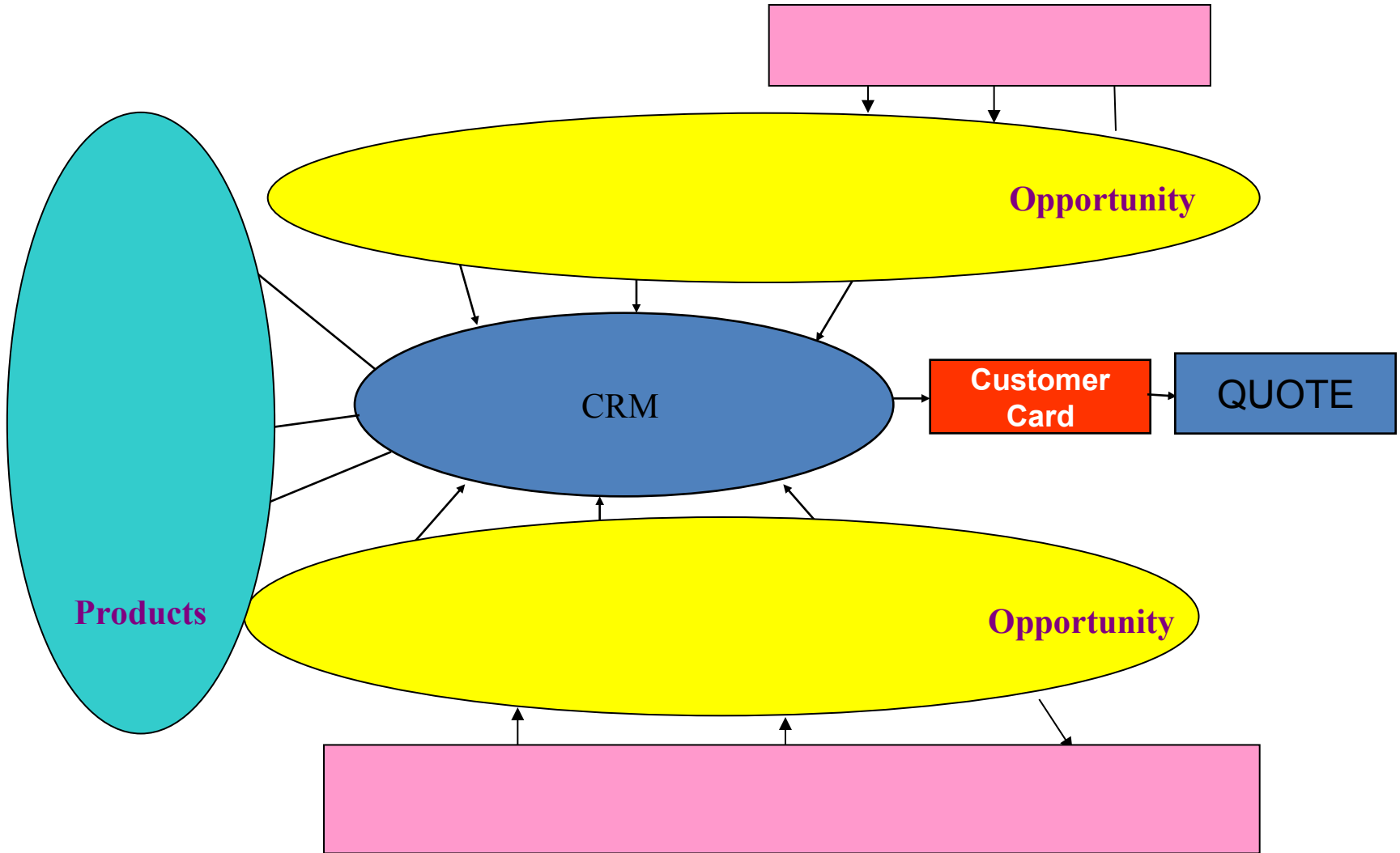
**Sales Cycle Stage**

**Meeting /Telephone call**

**Interaction Log Entries**

**Stage number ..... Activity**

# ERP-CRM



# 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

# 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

Profile

Contact    Functions    Create Interact    Help

# Contact Card-> Company-person

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

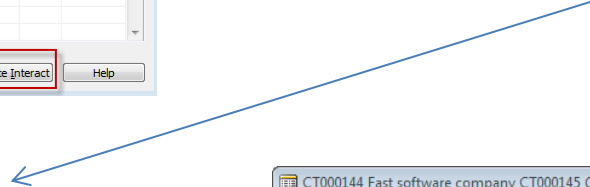
What is the type of interaction?  
MEETINV

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 – already created

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.

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

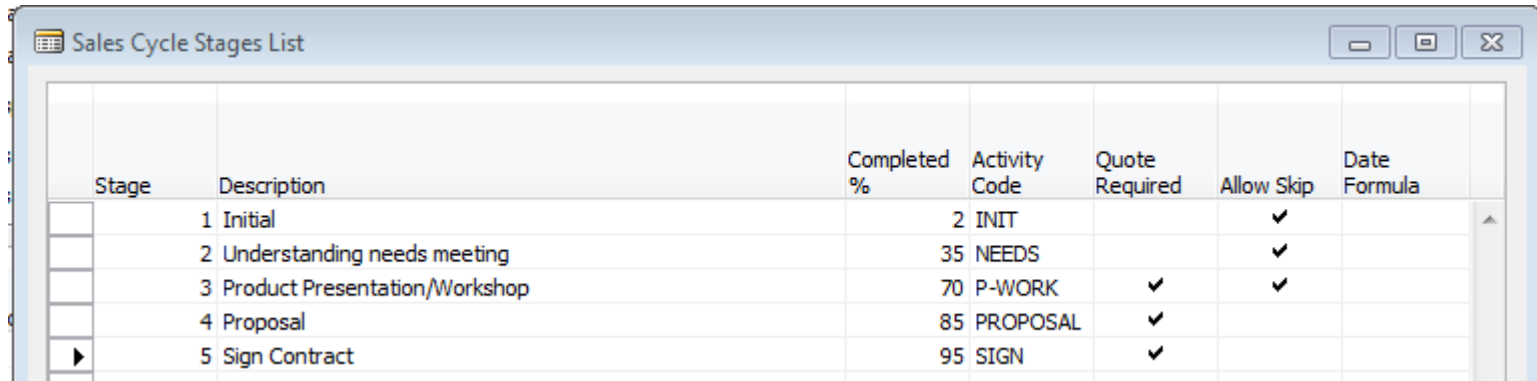
A red box highlights the 'Sales Cycle Stage' cell containing '1'. A red arrow points from this cell to a pop-up window titled 'Sales Cycle Stages List'.

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	✓			

The pop-up window includes 'OK', 'Cancel', 'Sales Cy...', and 'Help' buttons. At the bottom of the main window, there are 'Opportunity', 'Functions', 'Create Oppo...', and 'Help' buttons.

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	✓		

# End of the section XVI.

