Simple scenario Customer Relationship Management MS Dynamics NAV 2016w1

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Date	:	5.11.2018

Reason:		Orientation in the MS Dynamics NAV 2016|17. Material helping to understand basic CRM principles
For	:	MPH_AOMA, MPH_AOPR, PIS1, PIS2, EPS1 and MPH_RIOP
		BPH_PIS1 and MPH_RIOP for summer term 2019 (if required)
Used database	:	MS Dynamics NAV 2016/17 W1 (British one) – RTS
		MS Dynamics NAV 2016/17 Czech – RTS
Used abbreviations	:	Q=question, G/L=General Ledger, Simple Scenario = SS,
		PWP=Power-Point. PO-Purchase Order
Accompanying material:		Introduction MS Dynamics Purchase NAV RTC 20181003

1. **Simple task**: orientation in the MS Dynamics NAV part oriented to CRM. It means relationships between business partner cards (Vendors and Customer) and its Contact Cards.
2. We do have two types of Contact Cards (Company Cards – **Bold** ones and Person Cards)

Contacts ▾

No.	Name	Phone No.	Salespers... Code	Territory Code	Search Name
CT000043	**PLECHKONSTRUKT a.s.**		JR	FOREIGN	PLECHKO...
CT100168	Robert Zare		JR	FOREIGN	ROBERT Z...
CT000101	**POIIORLES d.d.**		RL	FOREIGN	POIIORLES...
CT000002	**Progressive Home Furnishings**		JR	FOREIGN	PROGRESS...
CT100218	Gary W. Yukich		JR	FOREIGN	GARY W. Y...
CT000066	**Progressive Home Furnishings**		RL	FOREIGN	PROGRESS...
CT200095	Joseph Matthews		RL	FOREIGN	JOSEPH M...
CT100204	Mary E. Gibson		RL	FOREIGN	MARY E. G...

3. To see Interactions related to these Contact Cards, use relevant icon or key combination Ctrl-F7.

4. Interaction (Telephone calls, meetings,…) –see interaction Groups from searching window

5. It the lower part of the contact card you can see profile (TU will explain more in detail)

Profile of the person

Profile of the company

Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Last Year	Low discount usage		31.1.2019
Pareto	A		27.4.2018
Customer Purchase Frequency, L...	> 5 times a year		31.1.2019
Customer Purchase Frequency, ...	> 5 times a year		31.1.2019
Turnover (LCY), Last Year	low (below 1,000)		31.1.2019
Turnover (LCY), Current Year	High (over 4,000)		31.1.2019
Discount (%) Current Year	Medium discount usage		31.1.2019
Profit (LCY) Current Year	Top 25 % of Customers		31.1.2019
Company Ownership	Stock Exchange		31.1.2019
No. of employees	1..99		31.1.2019

6. Create new Contact Card and then create from there new Customer card by use of the template

moreover, person contact working for Software Kings

CT000146 · Tim Bowen

General

No.:	CT000146	Country/Region Code:	AT
Type:	Person	Search Name:	TIM BOWEN
Company No.:	CT000145	Phone No.:	
Company Name:	Software Kings	Salesperson Code:	
Name:	Tim Bowen	Salutation Code:	UNISEX
Address:	Albert Einstein strasse	Last Date Modified:	5.11.2018
Address 2:		Date of Last Interaction:	
Post Code:	AT-1230	Last Date Attempted:	
City:	Wien	Next To-do Date:	

Lines

Find   Filter   Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Beverages	Beer		5.11.2018
Personality	Extrovert		5.11.2018
Educational level	Master/ Ph.d		5.11.2018
Marital Status	Married		5.11.2018
Hobbies	Golf		5.11.2018
Sex	Male		5.11.2018

the template will be found here and Create as a Customer:

You can also create a template for the Austrian Company. In our case, the British company has a subsidiary in Vienna. Click on chosen template

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

The C00010 record of the Customer has been created.

OK
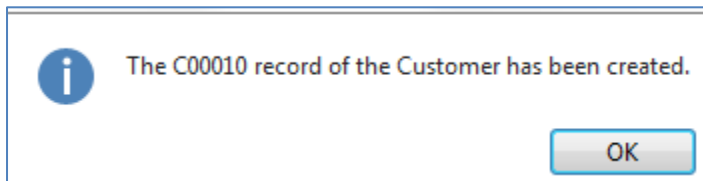
Create new interaction for Tim Bowen (just created contact) by use of wizard (e.g., incoming telephone call). The tutor will explain more in detail the sequence of actions.

CT000146 · Tim Bowen

General

| No.: | CT000146 | ... | Country/Region Code: | AT |
| Type: | Person | | Search Name: | TIM BOWEN |

C... F...	A... F...	Date	Interaction Template...	Description	Att...	Contact No.	Evaluation	Cost (LCY)	Duration (Min.)	Salesperson Code	Campaign No.	Opportunity No.	Entry No.	Co...
☐	☐	1.4.2019	INCOME	Call		CT000146	Very Positive	10,00	15	AH			118	No

Go and see how to setup questionnaires (profile) ->Sales->Sales and Marketing->Administration->Profile->Setup

Go there and ass some new properties

By use of Update Classification, you will find actual quantity of all contacts related to properties named in the questionnaire

Go to Opportunity list by the searching window (see Sales Cycle and other vital fields in the Opportunity lines) Make a choice of one of them (Status = In progress:

Tutor explain the primary meanings of these fields

Active	Action Taken	Sales Cycle Stage	Sales Cycle Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
☑	Next	2	Presentation	14.11.2018	19.11.2018	10 000,00	5 500,00	50	60	55
☐		1	Initial	13.11.2018	19.11.2018	1 000,00	310,00	2	60	31

Create a new opportunity by use of the wizard.

Let´s setup a new profile called Pareto based on Sales figures :

Before you enter data to the second form will be entered you must specify Details of the Question (Use icon Question Details ?)

Date Formula CM-5Y means Current month – 5 years.

See profile of contact cards of the customers, and you will see, that A , B or C codes classify most of them. Click on the calculated field No. of Contacts. We have chosen code B in our example. So you can see, that we do have four contacts

Contact No.		Contact Company Name	Contact Name
CT000003	▼	New Concepts Furniture	New Concepts Furniture
CT000032		Gagn & Gaman	Gagn & Gaman
CT000056		Englunds Kontorsmöbler AB	Englunds Kontorsmöbler AB
CT000063		Guildford Water Department	Guildford Water Department

From one chosen contact click od Contact number->Advanced->Edit and you will get

Lines

🔍 Find   Filter   ⌧ Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Current Year	Low discount usage		31.1.2019
Discount (%) Last Year	Low discount usage		31.1.2019
Pareto	B		5.11.2018
Customer Purchase Frequency, L...	< 3 times a year		31.1.2019
Customer Purchase Frequency, ...	< 3 times a year		31.1.2019
Turnover (LCY), Last Year	low (below 1,000)		31.1.2019