

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...

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

Can...	Atte... Failed	Date	Interaction Template...	Description	Att...	Contact No.	Evaluation	Cost (LCV)	Duration (Min.)	Salesperson Code	Campaign No.	Opportunity No.
<input type="checkbox"/>	<input type="checkbox"/>	24.8.2017	SV_ORD_C	Service Orde...		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	3.1.2019	S_SHIP	Order 101001		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	4.1.2019	S_SHIP	Order 101001		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	5.1.2019	S_SHIP	Order 101001		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	6.1.2019	S_INVOICE	Order 101001		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	13.1.2019	S_C_MEMO	Credit Mem...		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	16.1.2019	S_SHIP	Order 6005		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	16.1.2019	S_INVOICE	Order 6005		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	21.1.2019	S_SHIP	Invoice 1030...		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	21.1.2019	S_INVOICE	Invoice 1030...		CT000007		8,00	1 PS			
<input type="checkbox"/>	<input type="checkbox"/>	24.1.2019	S_SHIP	Order 101016		CT000007		8,00	1 PS			

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

Code	Description
DOC	Documents
LETTER	Letters
MEETING	Meetings
PHONE	Telephone conversations
PURCHASES	Purchase Documents
SALES	Sales Documents
SERVICE	Service Documents
SYSTEM	System Generated Entries

- In the lower part of the contact card you can see profile (TU will explain more in detail)

Profile of the person

Question	Answer	Questions Answered (%)	Last Date Updated
Educational level	Skilled		31.1.2019
Hobbies	Football		31.1.2019
Sex	Male		31.1.2019

Profile of the company

Lines			
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

CT000145 · Software Kings

General

No.: CT000145 Country/Region Code: AT

Type: Company Search Name: SOFTWARE KINGS

Company No.: CT000145 Phone No.: Salesperson Code:

Company Name: Software Kings Salutation Code: COMPANY

Name: Software Kings Last Date Modified: 5.11.2018

Address: Albert Einstein strasse Date of Last Interaction:

Address 2: Last Date Attempted:

Post Code: AT-1230 Next To-do Date:

City: Wien

Lines

Question	Answer	Questions Answered (%)	Last Date Updated
Additional Business Relations	Partner		5.11.2018
Company Ownership	Stock Exchange		5.11.2018
No. of employees	100..499		5.11.2018

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:
 Post Code: AT-1230 Date of Last Interaction:
 City: Wien Last Date Attempted:
 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:

Print Cover Sheet
Create as
 Link with existing
 New Sales Quote
 New Document

Contacts

No.	Name
CT000145	Software Kings

Microsoft Dynamics NAV

Do you want to create a contact CT000145 Software Kings as a customer using a customer template?

Yes No

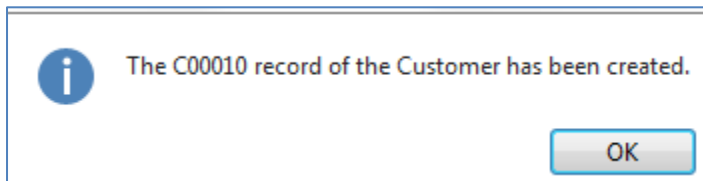
You can also create a template for the Austrian Company. In our case, the British company has a subsidiary in Vienna. Click on chosen template

Customer Template List

Type to filter (F3) Code

No filters applied

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		



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.

HOME ACTIONS NAVIGATE REPORT

Launch Web Source Print Cover Sheet Create as Link with existing Apply Template... Create Interact

Functions

CT000146 · Tim Bowen

General

No.: CT000146 Country/Region Code: AT

Type: Person Search Name: TIM BOWEN

C..	A..	Date	Interaction Template...	Description	Att...	Contact No.	Evaluation	Cost (LCV)	Duration (Min.)	Salesperson Code	Campaign No.	Opportunity No.	Entry No.	Co...
<input type="checkbox"/>	<input type="checkbox"/>	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

Administration

Setup

Mailing Groups

Campaign

Status

Profile

Questionnaire Setup

Profile Questionnaires Code

No filters applied

Code	Description	Priority	Contact Type	Business Relatio...
COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADQ	Lead Qualification	Normal	Companies	PROS
PARETO	Pareto analysis	Normal	Companies	CUST
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		CUST

Go there and ass some new properties

Profile Questionnaires Code

No filters applied

Code	Description	Priority	Contact Type	Business Relatio...
COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADQ	Lead Qualification	Normal	Companies	PROS
PARETO	Pareto analysis	Normal	Companies	CUST
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		CUST

HOME ACTIONS NAVIGATE

Create Rating Update Classification Move Up Move Down Print Test Report

Functions

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

Lines

Find Filter Clear Filter

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 %
<input checked="" type="checkbox"/>	Next	2	Presentation	14.11.2018	19.11.2018	10 000,00	5 500,00	50	60	55
<input type="checkbox"/>		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.

The screenshot shows the CRM interface for 'CRONUS International Ltd. Departments'. The top navigation bar includes 'HOME', 'ACTIONS', and 'NAVIGATE'. Under 'ACTIONS', the 'Create Opportunity' button is highlighted with a red box. Below this, the 'General' tab of an opportunity record is displayed for 'OP000003 - Export beer from CZ to France'. The record details include:

- No.: OP000003
- Description: Export beer from CZ to France
- Contact No.: CT000145
- Contact Name: Software Kings
- Contact Company Name: Software Kings
- Salesperson Code: AH
- Sales Document Type: [Dropdown]
- Sales Document No.: [Dropdown]
- Campaign No.: [Dropdown]
- Priority: Normal
- Sales Cycle Code: EX-SMALL
- Status: In Progress
- Closed:
- Creation Date: 1.4.2019
- Date Closed: [Dropdown]

Below the record details is a table of 'Lines' with the following data:

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 %
<input checked="" type="checkbox"/>		1 Initial		1.4.2019	8.11.2018	100 000,00	16 000,00	2	30	16

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

The screenshot shows the 'Edit - Profile Questionnaires' window. The 'ACTIONS' tab is active, and the 'Edit Questionnaire Setup...' button is highlighted with a red box. Below the actions, the 'Profile Questionnaires' section shows a dropdown menu with 'PARETO' selected. A table of profile questionnaires is displayed below:

Code	Description	Priority	Contact Type	Business Relatio...
PARETO	Pareto analysis	Normal	Companies	CUST

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

PARETO · Pareto

General

Description: Pareto Multiple Answers:

Classification

Auto Contact Classification: Starting Date Formula: CM-5Y

Customer Class. Field: Sales (LCY) Ending Date Formula: CM

Vendor Class. Field: Classification Method: Defined Value

Contact Class. Field: Sorting Method:

Min. % Questions Answered: No. of Decimals: 0

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

Edit - Profile Questionnaire Setup - PARETO

HOME ACTIONS NAVIGATE CRONUS International Ltd. ?

Question Details Answer Where-Used

Type	Description	Mul... Ans...	Priority	Auto Con...	From Value	To Value	No. of Contacts
Question	Pareto	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 001	1 000 000	13
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	101	1 000	4
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		100	51

Edit - Profile Questionnaire Setup - PARETO

HOME ACTIONS NAVIGATE CRONUS International Ltd. ?

Create Rating Update Classification Move Up Move Down Print Test Report

Type	Description	Mul... Ans...	Priority	Auto Con...	From Value	To Value	No. of Contacts
Question	Pareto	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 001	1 000 000	13
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	101	1 000	4
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		100	51

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 on Contact number->Advanced->Edit and you will get

Lines			
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