

Complex example II –Pareto_ ERP Microsoft Dynamics NAV 2018w1

Created by	:	Jaromír Skorkovský
Date	:	30.10.2019
For	:	MPH_AOMA and AOPR and BPH_EPS1
Database	:	MS Dynamics NAV 2018w1
Keys	:	Ctrl-N=New, F4=Look-up, Ctrl-F7=entries, F7=statistics, F9=post
Shorthands	:	G/L General Ledger, TO-Transfer Order
Tutor-TU		

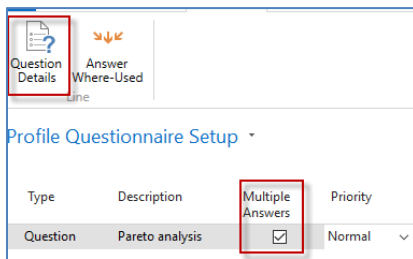
- Reason-> With the help of self-evaluation questionnaire controlled by setting limits to divide portfolio and contacts into groups A, B, and C in the sense that 20% of customers do 80% turnover (A), other customers are in the so-called middle zone (B) and are potential candidates for group (A) and the last group (C) has little turnover, but it can improve in the future. Please see the diagram that depicts the whole process of this complex example (last page)
- Open by use of searching window Questionnaire setup:

Code	Description	Priority	Contact Type	Business Relation Code
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		CUST

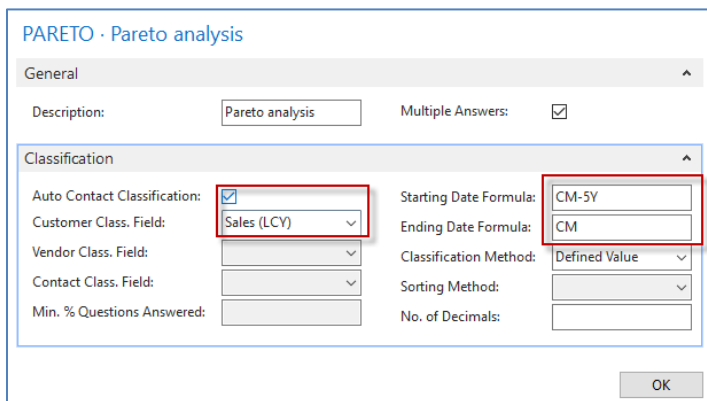
- Use icon New and enter Code = Pareto and Contact Type=Companies and Business Relation Code =CUST (Customers)

Code	Description	Priority	Contact Type	Business Relation Code
PARETO	Pareto Analysis	Normal	Companies	CUST

4. Use icon Edit Questionnaire setup



5. Check Multiple answers and go to Question Details and enter data as is shown on the lower window:



6. Enter the data into the form as shown in the picture below

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value
Question	Pareto analysis	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	10 001	100 000
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	201	10 000
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		200

7. Use icon Update Classification, and you will get :

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question	Pareto analysis	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	10 001	100 000	4
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	201	10 000	12
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		200	52

8. From Flow field (Calculated field) No. of Contact go directly to the Contact card, and you will see assigned group (A, B or C) in the contact profile (click on Contact number->Advanced->List of profiles->icon Edit)

Profile Questionnaire			
Find Filter Clear Filter			
Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Last Year	Low discount usage		31.01.2021
Pareto analysis	A		24.10.2019
Customer Purchase Frequency, Last Year	> 5 times a year		31.01.2021
Customer Purchase Frequency, Current...	> 5 times a year		31.01.2021
Turnover (LCY). Last Year	low (below 1,000)		31.01.2021

9. Open by use of searching window Segments:

Segments				
No.	Description	Campaign No.	Salespers... Code	Date
SM10001	Increase sale	CP1001	DC	28.01.2021
SM10002	Event	CP1002	BD	28.01.2021
SM10003	Working place arrangement...	CP1003	JR	28.01.2021
SM10004	Working place arrangement...	CP1003	JR	28.01.2021

10. Use icon New to create a new segment to the organization for contacts marked by A

The screenshot shows the 'New Segment' form for 'SM00001 - ESF campaign'. The 'ACTIONS' bar contains a 'Contacts' icon (a person with a plus sign) which is highlighted with a red box. The form has the following fields:

- Description: ESF campaign
- Date: 28.01.2021
- Salesperson Code: PS
- No. of Lines: 0
- No. of Criteria Actions: 0

Below the form is a table for 'Lines' with the following columns: Line, Contact No., Correspondence Type, Contact Company Name, Contact Name, Description, Salesperson Code, and In Te.

In the upper window, you see in BAR icon Contact, which must be used to get next picture (after choosing Contact Profile Answer area (tab) and entering a value into filed Profile Questionnaire code =Pareto and Answer =20000, which after use of mouse refers to code A

Options

Allow Existing Contacts:

Expand Companies:

▼ Show more fields

Contact

Contact Profile Answer

Show results:

✗ Where Profile Questionnaire Code ▼ is PARETO

✗ And Line No. ▼ is 20000 ▼

+ Add Filter

You will get 4 members from A group:

SM00001 · ESF campaign

General

Description: ESF campaign Date: 28.01.2021

Salesperson Code: PS No. of Lines: 4

No. of Criteria Actions: 1

▼ Show more fields

Lines

Line ▼ Functions ▼ Find Filter Clear Filter

Contact No.	Correspond... Type	Contact Company Name	Contact Name	Description	Salesperson Code	In Te
CT000059		Designstudio Gmunden		ESF campaign	PS	
CT000085		Hotel Pferdesee		ESF campaign	PS	
CT000078		Klubben		ESF campaign	PS	
CT000007		The Cannon Group PLC		ESF campaign	PS	

11. Go to Campaign (Searching window) and create a new campaign like the one below (use icon NEW)

CP0001 · ESF -Autumn 2019

General

No.: CP0001 ... Ending Date: 31.12.2019

Description: ESF -Autumn 2019 Salesperson Code: MD

Status Code: 1-PLAN Last Date Modified: 24.10.2019

Starting Date: 24.10.2019 Activated: No

Mind you that we have changed the ending date more to the future to respect the actual working date of this database.

Campaigns ▾

No.	Description	Salespers... Code	Status Code	Starting Date	Ending Date
CP0001	ESF -Autumn 2019	MD	1-PLAN	24.10.2019	13.05.2021
CP1001	Increase sale	DC	5-START	01.11.2020	01.04.2021
CP1002	Event	BD	9-DONE	20.01.2021	23.01.2021
CP1003	Working place arrangement	JR	5-START	10.01.2021	01.04.2021
CP1004	Spring offer	BD	1-PLAN	01.03.2021	01.06.2021

12. Add code of created campaign CP0001 to Segment SM00001 and check the Campaign target field and confirm by OK button.

SM00001 · ESF campaign

General

No.: SM00001 Date: 28.01.2021

Description: ESF campaign No. of Lines: 4

Salesperson Code: PS No. of Criteria Actions: 1

Lines

Contact No.	Correspond... Type	Contact Company Name	Contact Name	Description	Salesperson Code
CT000059		Designstudio Gmunden		ESF campaign	PS
CT000085		Hotel Pferdesee		ESF campaign	PS
CT000078		Klubben		ESF campaign	PS

Interaction

Campaign

Campaign No.: CP0001 Campaign Target:

Campaign Description: ESF -Autumn 2019 Campaign Response:

OK

13. Go to items and find item 1964-W. Add a new line with just created campaign.

General

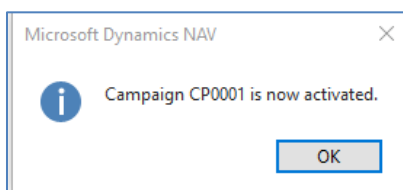
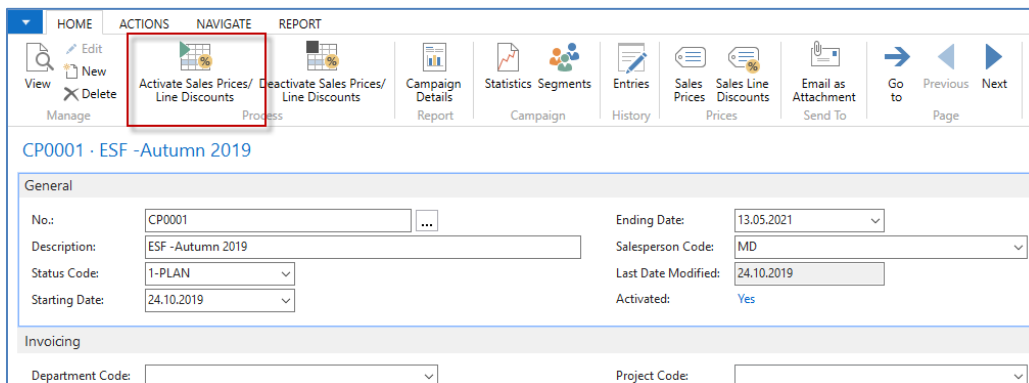
Sales Type Filter: None Type Filter: Item

Sales Code Filter: Code Filter: 1964-W

Starting Date Filter: Currency Code Filter:

Sales Type	Sales Code	Type	Code	Unit of Measur...	Minimum Quantity	Line Discount %	Starting Date	Ending Date
Customer	10000	Item	1964-W		9,00	10,00		
Customer	10000	Item	1964-W	PCS	7,00	5,00		
Campaign	CP0001	Item	1964-W	PCS	1,00	20,00	24.10.2019	13.05.2021

Then You must activate Campaign in question- so go back to campaigns and use Activate Sales Prices/Line Discounts icon



14. Create a new Sales Order for Customer 10000 and item 1964-W-See sales line only:

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measur...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Discount %	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. to Assign	Qty. Assign
Item	1964-W	INNSBRUCK Storage Unit/G.Door	BLUE	1	...		PCS	292,00	233,60	20	1		1			0

15. It can be seen that all customers who have a Pareto rating A assigned to their contact card will receive a **20% discount** on selected goods in the campaign associated with their segment.