

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 |

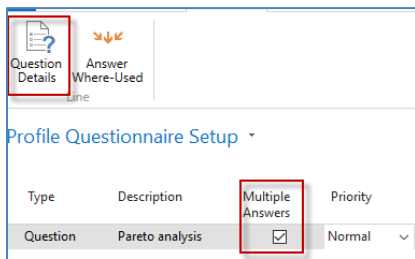
- Reason-> With the help of self-evaluation questionnaire controlled by setting limits to divide portfolio and contacts into groups A, B, and C in the sense that 20% of customers do 80% turnover (A), other customers are in the so-called middle zone (B) and are potential candidates for group (A) and the 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 |

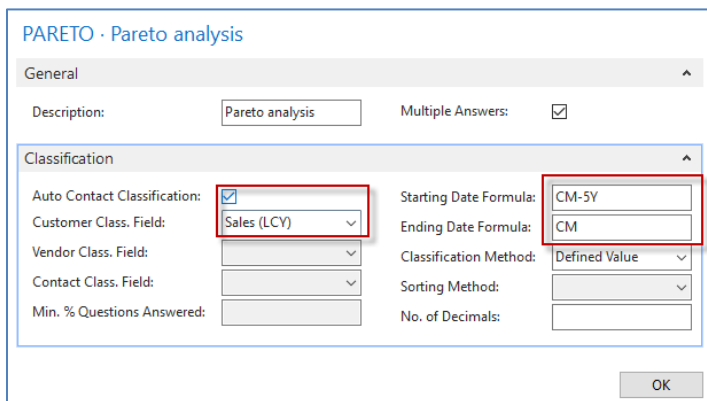
- Use icon New and enter Code = Pareto and Contact Type=Companies and Business Relation Code =CUST (Customers)

| 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 a software window titled "New - Segment - SM00001 - ESF campaign". At the top, there is a ribbon with "HOME" and "ACTIONS" tabs. Under "ACTIONS", several icons are visible, including "Log", "Contacts" (highlighted with a red box), "Segment", "Attachment", "Export Contacts", "Apply Mailing Group", "Print Cover Sheets", and "Print Labels". Below the ribbon, the "General" section contains fields for "Description" (ESF campaign), "Date" (28.01.2021), "Salesperson Code" (PS), "No. of Lines" (0), and "No. of Criteria Actions" (0). A "Show more fields" button is also present. The "Lines" section at the bottom is currently empty and has a table header with columns: "Line", "Contact No.", "Correspond... 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

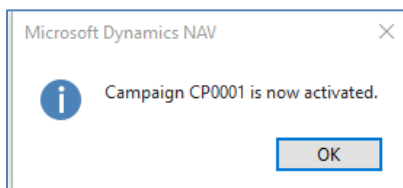
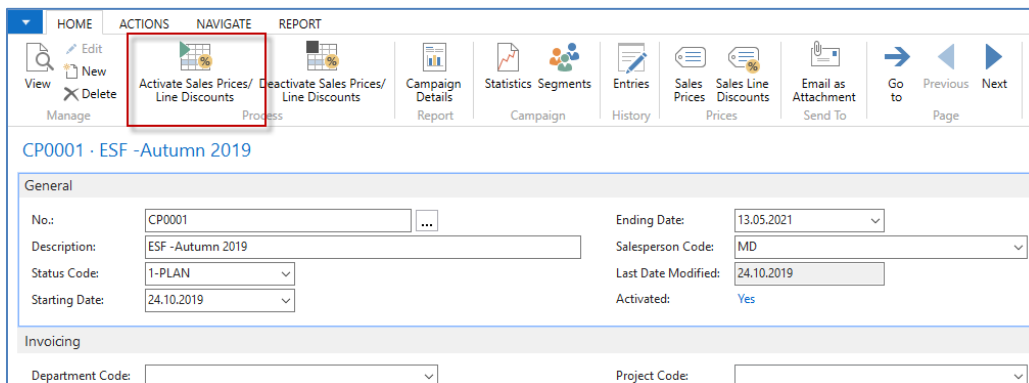
Sales Type Filter: None Type Filter: Item

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 |
|------|--------|-------------------------------|---------------|----------|---------------------------|-------------------|-------------------|----------------------|-----------------------|-----------------|--------------|------------------|-----------------|-------------------|----------------|
| 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.