# INTRODUCTION TO RELATIONSHIP MANAGEMENT

## Welcome

We know training is a vital component of retaining the value of your Microsoft®
Business Solutions investment. Our quality training from industry experts keeps
you up-to-date on your solution and helps you develop the skills necessary for
fully maximizing the value of your solution. Whether you choose Online
Training, Classroom Training, or Training Materials, there's a type of training to
meet everyone's needs. Choose the training type that best suits you so you can
stay ahead of the competition.

### Online Training

Online Training delivers convenient, in-depth training to you in the comfort of
your own home or office. Online training provides immediate access to training
24 hours a day. It's perfect for the customer who doesn't have the time or budget
to travel. Our newest online training option, eCourses, combine the efficiency of
online training with the in-depth product coverage of classroom training, with at
least two weeks to complete each course.

### Classroom Training

Classroom Training provides serious, in-depth learning through hands-on
interaction. From demonstrations to presentations to classroom activities, you'll
receive hands-on experience with instruction from our certified staff of experts.
Regularly scheduled throughout North America, you can be sure you'll find a
class convenient for you.

### Training Materials

Training Materials enable you to learn at your own pace, on your own time with
information-packed training manuals. Our wide variety of training manuals
feature an abundance of tips, tricks, and insights you can refer to again and again:
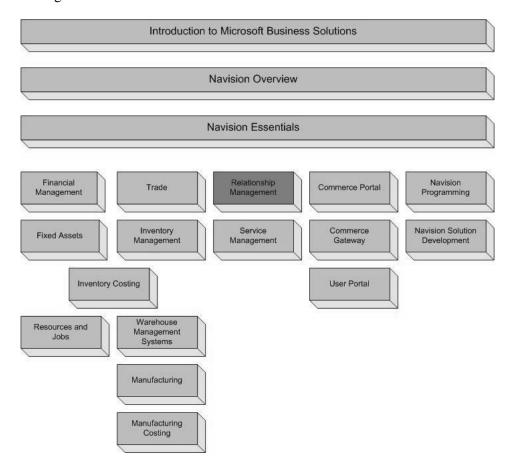
**Microsoft Business Solutions Training Courseware**: The Microsoft Business
Solutions Training Courseware are very detailed training manuals, designed from
a training perspective. These manuals include advanced topics as well as training
objectives, exercises, interactions, and quizzes.

Look for a complete list of manuals available for purchase on the Microsoft
Business Solutions website: www.microsoft.com/BusinessSolutions.

# About Microsoft Navision

Microsoft® Business Solutions – Navision® is a collaborative business management solution for medium-sized companies. It is an integrated product that includes functionality to support financial and relationship management, distribution, and manufacturing.

This course is designed for students who have a basic knowledge of Microsoft Navision (equivalent to the contents of the Microsoft Navision Essentials course) and is intended for people working at Microsoft Certified Business Solutions Partners who want to demonstrate, provide support for, and set up Relationship Management.

# About the Relationship Management Course

This Microsoft® Business Solutions–Navision® Relationship Management course is an instructor-led training course. It provides you with in-depth knowledge of the granules that make up the Relationship Management application area.

## Course Organization

The course consists of the following chapters:

- Chapter 1: Relationship Management Overview
- Chapter 2: Setup Procedures
- Chapter 3: Contacts
- Chapter 4: Interactions and Document Management
- Chapter 5: Campaigns and Segmentation
- Chapter 6: Task Management
- Chapter 7: Outlook Integration
- Chapter 8: Opportunity Management
- Chapter 9: Profiling and Classification
- Chapter 10: Multilanguage Salutation and Attachment
- Chapter 11: Quotation to Contacts
- Chapter 12: Document Logging

The chapters contain instructional text, which introduces an area of the program, examples of how this area works, and exercises that allow you to practice.

In addition to the course chapters, these appendixes offer you additional guidance and information:

- Appendix A: Course Schedule
- Appendix B: Terminology List
- Appendix C: Class Project
- Appendix D: Solutions to Test Your Skills

## Target Audience

The course is intended for people working in Microsoft Certified Business Solutions Partners who want to demonstrate and set up Relationship Management, and for those who want to be able to provide support for Relationship Management.

### Course Prerequisites

Participants need to have a basic knowledge of Microsoft Navision (equivalent to the contents of the Microsoft Business Solutions–Navision Essentials course), user-level knowledge of Microsoft® Word, Microsoft Outlook®, and Microsoft® Internet Explorer.

### Course Objectives

The course is designed to build the product knowledge required for you to demonstrate and set up Relationship Management, as well as providing you with the knowledge needed to be able to support Relationship Management.

# Course Overview

Before you begin the course, you must have Microsoft Navision installed.

Chapter 1, "Relationship Management Overview," introduces you to the concept of Relationship Management and gives you a general overview of the subject.

Chapter 2, "Setup Procedures," provides you with the steps to set up Relationship Management.

Chapter 3, "Contacts," teaches you how the program can help you manage your contacts.

Chapter 4, "Interactions and Document Management," teaches you how the program can help you log your interactions (which are all the types of communication between your company and your contacts) and how you can keep track of your documents.

Chapter 5, "Campaigns and Segmentation," teaches you how the program can help you create campaigns for various purposes and set up segments of your contacts.

Chapter 6, "Task Management," teaches you how you can use the tools in the program to manage your tasks.

Chapter 7, "Outlook Integration," teaches you how to set up and use MS Outlook integrated task, calendar, and meeting scheduling.

Chapter 8, "Opportunity Management," teaches you how to use opportunities to keep track of potential sales.

Chapter 9, "Profiling and Classification," teaches you how the program can help you create profiles of your contacts.

Chapter 10, "The Multilanguage Salutation and Attachment feature," provides you with steps to set up Salutations and Attachments.

Chapter 11, "The Quotation to Contacts feature," provides you with steps to set up a customer template and use it in quotation to contacts.

Chapter 12, "Document Logging," provides you with steps to apply this feature.

## Course Duration

We recommend that the course is taught taken over a period of three days. You can find a suggested schedule in Appendix A.

## Dates

The dates shown in the windows are in the European format Therefore, if you use a different date format, for example, the American format; there will be differences between the solutions in the training material and your solutions. The working date is set to be 25-01-07 (25 January 2007). It is important that this date is used when doing the activities.

## Demonstration Data

All exercises are based on a fictitious company, CRONUS International Ltd.

## License Information

To run the examples and exercises in this course, you need a training license.

## Further Information

You can learn more about Microsoft Navision in the Microsoft® Business Solutions–Navision® Essentials and Financial Management Courses.

# Student Objectives

What do you hope to learn by participating in this course?

List three main objectives below.

1.

<br>

2.

<br>

3.

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